ProDoc® Document Assembly Software

Software Manual

Version 5

www.prodoc.com

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Revised 11/7/2008

Welcome to ProDoc®

Thank you for choosing us as your solution for automating your practice to save time, reduce errors, and better serve your clients.

So you can reap the most benefit from ProDoc, the following services are standard with your subscription:

*** Automatic Updates - We continually enhance ProDoc software and our form templates. We send you these updates at no charge several times each year and particularly before new legislation takes effect, so your ProDoc-generated documents are always current with the law.**

*** FREE Training - In a few days, you'll receive a call from our Customer Support Department to set up free phone training for you and your staff. The purpose of the training is to help your team quickly learn how to assimilate ProDoc software into your practice.**

*** Toll-Free Technical Support - Feel free to call our Customer Service Center at 800-759-5418 for any questions you may have regarding the software. We particularly encourage you to call us when you're ready to install ProDoc on your network.**

Finally, visit www.prodoc.com/support/index.asp to view our FAQs, hours of operation, and other helpful information.

Many of our subscribers report that ProDoc pays for itself many times over through increased productivity and reduced error rates. Based on our experience, you'll discover ProDoc's benefits when you and your staff overcome your natural reluctance to change from your comfortable, but inefficient, way of generating documents to the new, and more efficient, ProDoc way.

That's why we encourage you to make the time to take advantage of our free training; it will be one of the best investments you and your staff will ever make in your practice.

We guarantee it!

For more information, please call ProDoc at 1-800-759-5418.

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Software Manual Introduction

Overview of this Manual

Navigating Through This Manual

Click on the blue highlighted text links throughout the manual to jump to a topic or get more information.

Click on the back arrow at the bottom of your screen, , or press **Alt + Left Arrow** on your keyboard to return to your previous view. If you scrolled or linked more than once, you will need to do this more than once to return to where you started.

Click on topic titles listed in the **Table of Contents** to jump to the indicated topic.

You can also use the bookmarks provided in the Adobe navigation pane to pick the topic you want to see.

Quick Links to Each Program's Section

The **ProDoc Program** 4 is the primary program used for document assembly. **PowerPack** programs, specific to each state we serve, are available as additional subscription items. These programs are designed to work with ProDoc and significantly increase your productivity. These programs allow you to enter information in your clients' case files and manage the information quickly and efficiently. If calculations are necessary, the program makes them and inserts the results wherever they are needed. The information you enter is saved in ProDoc data files for future use.

You can click the blue links below to jump to the sections of this manual which describe the processes and features of different ProDoc programs.

ProDoc Program 4 - Covers all major program functions and includes appendices on network considerations, ProDoc's internal operations, linking your ProDoc data with Timeslips and creating your own supplemental forms.

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Other Reference Material

The following documents are stored in your ProDoc home directory in a folder named "Documentation", along with the manual.

ProDoc Quick Reference Card - This document gives you procedures for major ProDoc functions, short and to the point, on two pages.

ProDoc Quick Start Guide - This document is the electronic version of the pamphlet inside your CD shipping jacket. It helps you quickly start assembling documents with ProDoc and guides you step-by-step through the **Quick Start Assistant** procedures.

The **ProDoc Software Manual, Quick Reference Card** and **Quick Start Guide** can also be viewed and/or printed from your desktop by clicking **Start > Programs > ProDoc > Documentation,** then clicking the appropriate file name.

Warranty Information

Legal Notices

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Customer Support

Telephone Assistance

Our staff of highly skilled support technicians and attorney developers are available to assist qualified users during regular business hours. The phone number for support is 800-759-5418.

You can also send an email to tech@prodoc.com.

Other Available Support Resources

- Help buttons on each ProDoc window
- Quick Reference Cards
- At the **ProDoc Web site**:
  - Online Tips and FAQs
  - Computer Based Training (CBT) Modules
  - Periodic Internet live training seminars
  - Schedule training seminars in your area

ProDoc Website

You are also invited to visit our Internet Web site at www.prodoc.com, which provides helpful information such as ProDoc Tips, Tech Notes, a list of frequently asked questions/answers (FAQs) and computer based training modules for major ProDoc functions. You can also schedule training seminars convenient to your location (subject to geographic availability) and join live seminars conducted over the Internet.

Current and prospective customers will also find a wealth of information about ProDoc, including major features and sales information. Our Web site is constantly undergoing changes so be sure to visit often. Let us know how we can improve its overall content to better serve your needs.

ProDoc® Program Introduction

Welcome to ProDoc

Congratulations!

You have purchased the finest document assembly system for legal professionals available today. It is a revolutionary tool which vastly increases office productivity by automating repetitive document assembly tasks.

Several features make ProDoc superior to many other document assembly programs:

- **Displaying in Context** — The "cut-and-pasted" form is displayed while you are answering the fill-in-the-blank questions. If you prefer to answer the questions in questionnaire boxes instead of the context window, you may do so.
- **Client/Case Manager** — You can easily create and update clients and cases, even while you are simultaneously selecting a case. The related **Case Answers** feature helps you change answers to the questions asked during previous document assembly sessions for each client and their individual cases. When you assemble subsequent documents for a case, you have the option of answering only the new questions which you have not previously answered. You can still review each question previously answered if desired.
- **Document Manager** — The document manager feature helps you keep track of what documents you have assembled for each client and case. It has many of the same features as your Windows Explorer (file manager) to facilitate the management of all of your documents right from ProDoc.
- **Working with Multiple Documents** — Since law offices generally work with sets of related documents, ProDoc is designed to assemble multiple documents in a single session. This capability is further facilitated by the **Form Sets** feature, which allows you to pre-select commonly used groups of forms. These features are an extremely efficient way to produce documents because related information is shared between documents and fewer questions must be answered.
- **Supplemental Forms (templates)** — You can prepare your own supplemental forms, create the necessary fill-in-the-blank questions, and generate the finished document in ProDoc. Your supplemental forms and questions are kept separate from the ProDoc master forms (templates) and questions, but you can assemble supplemental forms in the same session with the ProDoc standard forms.
- **Graphic forms capability** — This gives you the capability to assemble popular predefined fill-in-the-blank graphic forms. These forms can be assembled and printed directly from within ProDoc. Press the **F1** key while using the **Graphic Form Filler** to see additional information on how to assemble and print these forms.
- **Timeslips extension (optional feature)** — If you have Timeslips (version 9.1 or newer), you can integrate it with ProDoc to generate Timeslips "slips" while maintaining synchronized ProDoc and Timeslips databases. Consult **Appendix C** 281 for assistance in setting up and using this optional feature.
- **Long filename support (Windows 98/ME/NT/2000/XP/Vista)** — This enhancement permits the use of more descriptive names for completed documents and their storage folders. Click the **Help** button on the **Options And Settings** window for assistance in setting up your operating preferences.
- **Streamlined document assembly** — We have consolidated the steps necessary to initiate a document assembly session into one composite window to simplify and expedite the overall document assembly process. Click the **Help** button on the **Starting Document Assembly** window for additional information on how to use this feature.

- **Print various lists and reports** — You can print client lists, case data sheets, labels and QuickText reports from information drawn from the ProDoc client and case database. ProDoc also allows you to print blank forms, form lists, questions lists and form worksheets from the volume libraries to which you subscribe.
- **Print labels** — ProDoc has the ability to print mailing labels from information in your client and case database.
- **Export client and case data** — You can export your client and case database information for use by other law office automation software systems.
- **Custom Fields** — Several user definable fields have been added for both contacts and cases to allow you to track additional information you want such as client social security numbers and cause numbers for cases.

We believe that you will be amazed at the simplicity and efficiency with which our software creates your legal documents. We are committed to developing the finest document assembly system available. We welcome your comments and suggestions so that we can continue to improve ProDoc with the features you need.

About ProDoc

ProDoc begins document assembly by asking a series of questions, then using the responses to determine the clauses and paragraphs to use in the final document. Following these questions, the form itself is shown, displaying finished legal language and all data completed to this point. Finally, users answer questions to enter the data in the remaining blank fields to complete the document. What you do not see is the complete logic the computer is processing in order to determine which questions need to be asked, skipped or answered automatically. It also renumbers all paragraphs and inserts proper gender pronouns. This system goes far beyond the simple "merge" systems that do nothing more than fill in the blanks.

The logic built into ProDoc is very extensive and results in an extremely efficient operation that asks all the questions that need to be asked while skipping the ones that do not apply to the transaction. In fact, many times the program will be able to determine the proper answer without even having to ask you. Information input for a particular client and case is saved for automatic use in subsequent document preparation for that client's case. Also, some information may always or nearly always be the same, e.g. attorney's name, address, signature block, etc. This information can be set as defaults to automatically appear whenever they are called for in any document.

ProDoc generated documents may be changed or customized. The master forms that contain the standard wording and clauses can be permanently edited by using your word processor. That way, you can insert your own customized wording to be included in the documents every time. Additionally, after a document is created by the system, you can use your word processor for the final editing and printing.

ProDoc was designed to be a versatile tool that can change and grow with your law practice and with the times. Its design allows you to build an entire library of volumes containing the documents you need most in your office. There are four types of information contained in each volume:

- **Master Forms** (templates) which are files containing the text and codes ProDoc uses to create the shell of your document.
- **Data Files** containing instructions telling ProDoc which questions to ask and what to do with your answers. ProDoc merges data and answers to the questions in the master forms to create a finished document.
- **Help Files** with explanations and information to help you use ProDoc.
- **Supplemental Forms** (templates) and **Supplemental Questions** are created by you to extend the power of ProDoc. They work just like the master forms in the volumes which you purchased,

but cover the specific areas you need for your legal practice. Appendix D 294 details the procedure for creating supplemental forms.

How ProDoc Assembles Documents

ProDoc uses master forms (templates) which contain standard document text clauses that go into the finished document. These master forms also include special character strings (called tokens) which tell ProDoc how to assemble the document and which questions to ask during the assembly process. Master forms for each volume library are stored on your hard disk in a subdirectory under the main ProDoc directory. It is possible to customize master forms using WordPerfect or any other word processor which can read and write documents in the WordPerfect format. Information on customizing master forms can be found in chapter 3 of this manual.

ProDoc goes through five separate steps in the process of preparing your documents.

1. **Transaction Setup -** In this step, you select the volume you want to work with, select the master forms you want to assemble completed documents for, specify whether you want to view the document during the merge or fill-in-the-blank phase, tell ProDoc whether to save your answers, and specify where to save the documents after they are prepared.
2. **Assembly Questions -** In this step, ProDoc asks questions that allow the program to assemble an intermediate document from the master form. The questions are asked using logic programmed by the ProDoc development staff. This logic instructs the program to skip irrelevant questions, offer preset default answers, copy prior answers, assign answers based on logic, or perform other time saving functions.
3. **Intermediate Document Creation** - In this step, ProDoc takes the answers you entered in the assembly questions and deletes or inserts clauses and paragraphs to create an intermediate document.
4. **Merge Phase Questions** - Also called filling-in-the-blanks. In this step, ProDoc asks questions whose answers will be inserted into the document or used to calculate other text to insert. For instance, a question might ask for the date of birth of the ward in a guardianship to be entered numerically, e.g. 01/11/99. ProDoc might use this answer to insert the ward's date of birth into a document as January 11, 1999, and might calculate and insert the ward's age. The questions use logic to simplify your work.
5. **Final Document Creation -** In this step, answers to merge questions and text calculated from them is inserted into the final document. The completed final document is saved as a word processor file according to the instructions given by you during transaction setup.

Chapter 1, Installation and Setup

Introduction to ProDoc Setup

This chapter will cover the information that you need to install ProDoc on your computer or network. Check the System Requirements and make sure that your computer meets the minimum standards for performance. If your computer does not meet these standards, you will need to upgrade or purchase a new computer before using ProDoc. Follow the installation steps carefully and you will have ProDoc up and running in no time at all.

System Requirements

ProDoc can be installed to any desktop or laptop computer meeting the following requirements. It can be installed on either a client/server or peer-to-peer network and accessed through desktop shortcuts on individual workstations. Offices installing ProDoc on a network are encouraged to read **Appendix A** 268 of this manual.

You will need the following resources to run ProDoc with acceptable performance:

Hardware Requirements

An IBM®-compatible computer with at least 1 GB of RAM, a CD ROM drive, and a local hard disk drive (or network disk drive) with sufficient space to install and run ProDoc and the volumes. A monitor is required with a resolution of at least 1024 x 768 pixels. A Network Interface connection is required with a throughput of at least 1 Gbps for local network and high speed internet connection.

Operating System Requirements

Microsoft® Windows® 2000, Windows XP, or Windows Vista with all service releases and service packs.

Word Processor Requirements

In order to edit, save and print completed documents using ProDoc and SOS, a separate word processing program is required. Select either Corel® WordPerfect® 12 (or newer) or Microsoft Word® 2003 for Windows (or newer) with all service releases and service packs.

Stand-alone or Networked

ProDoc can be installed to any desktop or laptop computer meeting the above requirements as a stand-alone program. It can also be installed on a server or host computer on either a client/server or peer-to-peer network, and the program can be used from shortcuts on client computer desktops.

Backup Tape Drive

It is very important that you use a tape drive to backup ProDoc files. You may use other forms of media to backup ProDoc, but we believe that it is in your best interest to get a tape drive for backups if you do not already have one.

Installing ProDoc

Networked Law firms should first read Appendix A 268, and then install ProDoc on their network server, paying particular attention to "network install note" annotations that appear during the installation process.

NOTE: These steps pertain especially to a new installation. Users updating an existing ProDoc installation will see somewhat different windows.

INSTALLATION INSTRUCTIONS

Step #1 - Insert the CD into your CD-ROM drive.

Step #2 - Installation will normally start automatically. If not, see the **Quick Start Guide** in the CD shipping folder for help with beginning the installation process.

Step #3 – Opening Screen

Click **Next** to begin the installation.

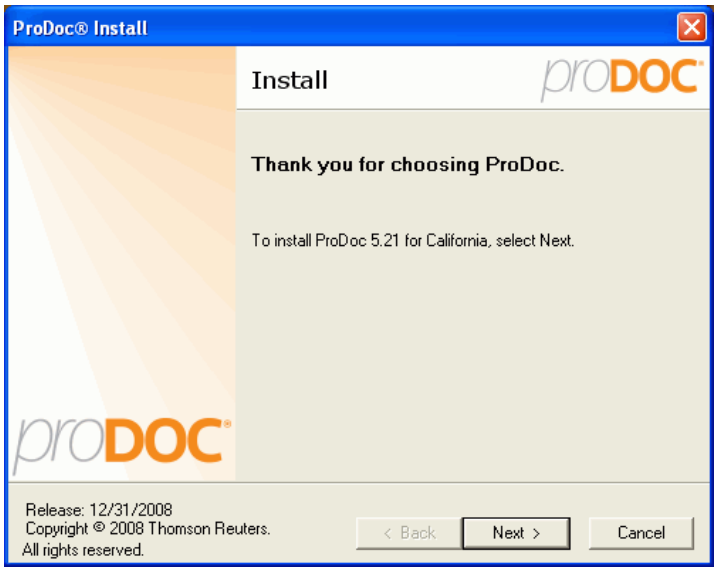

Figure 1-1, Installation Start Window

Step #4 - Enter Key Code

Setup will update or install ProDoc and volume libraries in accordance with a unique installation key code. Enter your unique **Key Code** and then click **Next** to continue the installation.

ProDoc® Install
Enter Key Code
proDOC
We will install or update ProDoc® products according to your unique installation key code.
Please enter the installation key code.
Installation Key Code
0000 - 0000 - 0000 - 0000 - 0000
Note: It is strongly recommended that you exit all Windows programs before running this installation.
For further assistance, please call Technical Support at (800) 759-5418.
Release: 12/31/2008
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< Back
Next >
Cancel

Figure 1-2, Installation Key Code entry window

Step #5 - Accept or reject End User License Agreements

The **ProDoc End User License Agreement** window appears. Read the license agreement. You can scroll through it with the scroll bar on the right side of the window. Click the appropriate button to indicate whether you accept or do not accept the terms of the agreement.

If you are subscribing to a volume containing state bar licensed forms, the state-specific **State Bar License Agreement** window appears. You can scroll through it with the scroll bar on the right side of the window. If you accept the agreement, click the **Accept** button. If not, click the **Do NOT Accept** button.

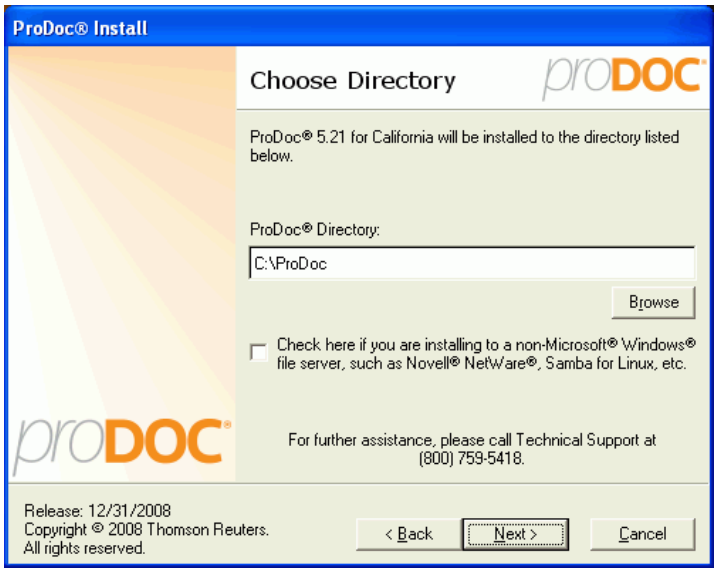
Step #6 - Confirm products to be installed

Figure 1-3, Select Product(s) to be Installed Window

A window like the one shown in Figure 1-3 confirms which products will be installed per the installation

key code you entered in step #4. Although it's not recommended, you can deselect or select individual volumes if desired. Normally, just click **Next** to continue the installation.

Step #7 – Verify installation location and network settings


ProDoc® Install
Choose Directory
proDOC
ProDoc® 5.21 for California will be installed to the directory listed below.
ProDoc® Directory:
C:\ProDoc
Browse
Check here if you are installing to a non-Microsoft® Windows® file server, such as Novell® NetWare®, Samba for Linux, etc.
For further assistance, please call Technical Support at (800) 759-5418.
Release: 12/31/2008
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< Back
Next >
Cancel

Figure 1-4, Installation Destination Window

A window similar to Figure 1-4 appears. If the installation program doesn't detect a network, the suggested default installation location is the C:\ProDoc folder. We recommend you use the default setting. If you wish to change this, type the path and folder name or click the button next to the field to browse to the folder you wish to use. If the installation folder doesn't exist, the installation program will create it for you.

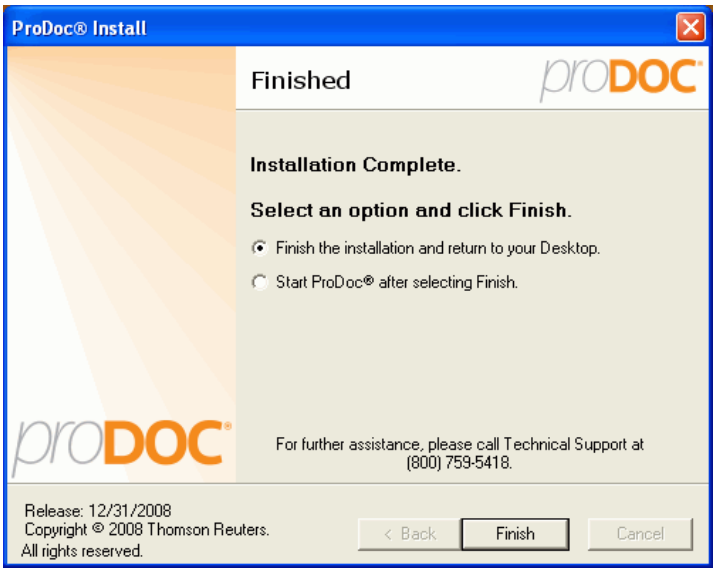
If the program detects a network, it will suggest a network drive for installation. See **Appendix A** 268 of the software manual for detailed information on installing and using ProDoc on your network.

If you intend to use ProDoc on a network drive and the network file server is a non-Windows server, such as Linux, Novell, etc., click the box as indicated. When you are finished, click the **Next** button.

Step #8 – Selection of "Add In" features

This window provides you an opportunity to select which optional features to install. Click the **Help** button for additional information. Then, click **Next** to continue the installation.

Step #9 – Finish Installation



A window appears which displays the status of the installation process. When it is complete, a window appears similar to Figure 1-5 indicating the installation is finished. Select the option you want by clicking the button next to the selection; then click the **Finish** button.

Figure 1-5, Installation Finished Window

Your ProDoc program installation is complete. You will find a ProDoc icon on your desktop and in Window's Programs/ProDoc group. You can run ProDoc by double-clicking the ProDoc icon on your desktop. You can also click the **Start** button, go to the **ProDoc program group** and click **ProDoc.**

Registration and Setup

When you first run ProDoc, the **ProDoc Registration** window will appear. You will only need to register ProDoc once, immediately after installation. When you install periodic updates, your registration will be automatically extended. The sections below correspond to the buttons available on the window. We recommend you use the steps below to register now.

Register

1. Carefully enter your 24 digit registration code. This code is printed on your Shipping Advice and Invoice. If you don't have the code, you can call **1-800-759-5418** for help in retrieving the code. Click the **Register** button.

   (if available)

   a. If you entered the correct code, **ProDoc will check your computer for an active Internet connection. If one is found,** you will see a window displaying your **Firm Name** as it appears in our records.

   b. If you see an error message instead, click **OK,** carefully enter the code again and click **Register.**

   c. **If your computer cannot connect to the Internet, you will see a window telling you that you can try again or register by fax. Click the OK button to return to the ProDoc Registration window, which will now display the Register by Fax 12 button along with the others. Follow the steps listed in the Register by Fax 12 section below.**

2. The next window displays your **Firm Name** as it is listed in our records. If the firm name isn't correct, you can change it at this point. After the firm name is ready, click the **Continue** button.

3. The **Confirm Firm Name** window appears. This window provides an opportunity to make changes to your firm name. If it is correct as shown, click the **This is My Firm Name** button. If not, click the **Change Firm Name** button, make necessary changes, and click **Continue** to

return to this window.

4. A window will appear informing you that your registration process is complete. Click the **Continue and Run ProDoc** button to exit the window.

(If available)

Register by Fax. You can only use this option if you **don't** have an Internet connection. If you do, the **Register by Fax** button will **not** appear.

1. Click the **Register by Fax** button. The **ProDoc Fax Registration** window appears.
   a. Enter your registration code.
   b. Enter your **Firm Name** (or confirm it if you are a present user). This name will appear on all of your documents, pleadings, etc. that you produce with ProDoc.
   c. Enter a **Contact Name, Fax Number** and **Phone Number** in the appropriate fields.
   d. When you are sure the above entries are correct, click the **Print Fax Instructions and Continue** button.
2. The **Confirm Firm Name** window appears. This window provides you one more opportunity to make firm name changes. If it is correct as shown, click the **This is My Firm Name** button. If not, click the **Change Firm Name** button, make necessary changes, and click **Continue** to return to this window.
3. You will be prompted to print a form to fax to us. This form contains information that we need to know in order to register your software.
4. After you print the form, a window will appear informing you that you've completed the first part of the process. ProDoc will be temporarily registered for 15 days. Click the **OK** button to close the window. Fax the form to us at 1-866-306-2697. We will send you a confirmation code by either fax or mail.
5. At this point, each time you open ProDoc, the **Complete the Registration Process** window will open prior to login. To open the window after ProDoc is already running, click **Tools → Registration → Register ProDoc.**
   a. Enter the confirmation code in the displayed fields. If you still do not have your confirmation code, you can click the appropriate buttons to re-print the fax instruction sheet, register later, or exit without registering. If you have an internet connection, you can click the **Register (Recommended)** button to register over the Internet.
   b. After entering the confirmation code, click the **Complete Registration** button. A window will appear telling you the registration process is complete. Click the **Continue and Run ProDoc** button.

Register Later and Run ProDoc. If you choose this option:

- A window will appear informing you that a temporary registration has been created for you which will expire in 15 days.
- The **ProDoc Registration** window will appear each time you run ProDoc for the next 15 days to help you register. To register while you are working in ProDoc, click **Tools → Registration → Register ProDoc** and use the steps in the **Register** 11 section above.
- If you don't register within 15 days, you will only be able to use ProDoc after you register the software.

Exit ProDoc without Registering. If you choose this option, the registration window will appear each time you run ProDoc. After you register, it will no longer appear.

Setup Windows. After you select your choices for registration, other windows appear to help you tailor

the installation to your needs.

- **Logging In.** The program will ask you to enter login initials or name. Type your initials or login name (depending on your preferred method) in the field provided. Your initials or login name can be up to 20 characters long. Since this is the first time these initials have been used, a message box will appear stating that you have not logged in with these initials before and asks if you want to log on. Click **OK** to use the initials. Click **OK** again and ProDoc will activate.
- The first user who logs in is designated as the Supervisor. Supervisors will see a **Customize** menu item called **Manage Users Login** and can designate other users as Supervisors or Users. This function is fully discussed in the **Manage Users Login** 13 section.

(If available)

- The **Options and Settings** window will appear, displaying the **Firm Information** box. It will display your **Firm Name** differently depending on whether or not you have registered your software. **Please note that you cannot change the Firm Name at this window.**
  - If you have not yet registered, the **Firm Name** will appear as **Unregistered User. When you register, you will designate your firm name.**
  - If you have already registered, your firm name will appear as you entered it during registration. **If you need to change your firm name in the future, click Tools → Registration → Change Firm Name.**
  - Enter your firm's information in the appropriate fields. The required entries are **Firm Name (completed for you)**, the first **Address field, City, State, Zip Code** and **Phone.** We recommend that you also complete any other fields which apply to your firm. The information you enter will appear on many of your documents.
- Another window appears offering to install a toolbar in your word processor. We recommend you click the **OK** button. This will make it much easier to work with documents in both ProDoc and in your word processor. You can remove it or reinstall it later in the **Customize → Options** menu. If you choose to install the toolbar, simply follow the prompts in succeeding windows.

Manage Users Login

The first person to sign on and run ProDoc will be added to the Staff file as the only supervisor. Supervisors are able to view and use a menu choice under the **Customize** menu titled **Manage Users Login**. From this menu, the supervisor can add, change or delete user records and specify default settings for new users.

Click **Customize → Manage Users Login** to display the **Browse Users Records** window (Figure 1-6).

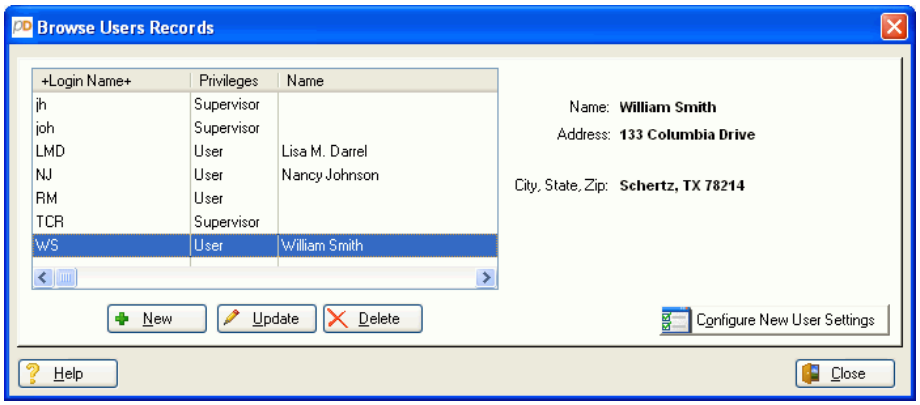


Figure 1-6, Browse Users Records Window

This window displays all users who have logged in previously to ProDoc, along with their privilege level and name (if entered). If the information has been entered, the highlighted user's name and address are displayed on the right side of the window. Buttons and their functions are described below:

New - Click this button to add a user, the user's privilege level, and name and address data. You must enter at least a login name. If you enter no other information, the privilege level will default to **User**.

Update - Click this button to edit any of the above information for the highlighted user.

Delete - Click this button to delete a user. A confirmation window will appear. Click the **OK** button to delete the user or the **Cancel** button to keep the user. You can right click a user name and click the **New, Update** or **Delete** selections on the pop-up menu to perform the same functions.

Configure New User Settings - Click this button to specify default personal settings for new users. A confirmation window will appear which states that settings for existing users will not be affected. To continue to the settings window, click the **Yes** button. To stop, click the **No** button. If desired, you can specify initial personal settings for document assembly, completed documents and WebUpdate. Settings for Word Processor, Graphic Forms and Miscellaneous Personal Settings categories cannot be changed; these links on this window are inactive. Individual users can change these settings later if desired. Click the **Help** button on each setting window for more detailed help. An explanation of these settings is available at the following links: **Assembly Settings** 64, **Completed Documents Settings** 66 and **WebUpdate Settings** 68.

Compatibility Mode

If a program will not run under Microsoft Vista or Windows XP, these operating systems attempt to run the program so that it thinks it's operating under a compatible operating system in an effort to make the program work. For example, if a program's compatibility mode is set to Windows 98, these operating systems will try to make the program think it is running under Windows 98.

ProDoc should not be run in a compatibility mode and, in fact, will not run properly in the compatibility modes for Windows 98 or ME. Thomson Reuters products run well on all versions of Windows 98 and later versions of Windows. On computers with Windows Vista or XP, all compatibility mode settings should be turned off.

Shutting Off Compatibility Mode

There are two ways to turn off the compatibility mode for ProDoc on your computer. You may shut off the compatibility mode with Windows Explorer or through ProDoc's shortcut on your desktop.

To shut off the compatibility mode using Windows Explorer:

1. Open Windows Explorer.
2. Scroll to the ProDoc folder and open it.
3. Locate the **Prowin.exe** file and right click it.
4. From the menu that appears, click Properties.
5. On the **Properties** box, click the **Compatibility** tab.
6. In the section titled Compatibility Mode, make sure the box next to **Run this program in compatibility mode for:** is unchecked.
7. Click OK.

To shut off the compatibility mode through ProDoc's shortcut:

1. On your desktop, locate the ProDoc icon and right click it.

2. From the menu that appears, click **Properties.**
3. On the **ProDoc Properties** box, click the **Compatibility tab.**
4. In the section titled **Compatibility Mode,** make sure the box next to **Run this program in compatibility mode for:** is unchecked.
5. Click OK.

NOTE: If you are running ProDoc across a network, you must make compatibility changes to the computer on which Prowin.exe is installed because this is the only computer on the network that can set a compatibility mode for Prowin.exe. If you try to access the compatibility mode feature from a computer that has a shortcut pointing to the network drive on which ProDoc is loaded, your compatibility settings will be disabled.

Chapter 2, Assembling Documents

Assembling Documents

Overview

This chapter guides you through a document assembly session step-by-step to illustrate the basics of the document assembly process. Keep in mind that simply following the steps outlined here only gives you a small portion of the power, productivity and efficiency of ProDoc. Refer to Chapter 3 for additional details about the ProDoc software's various menu driven features.

NOTES: The process described here primarily addresses the assembly of typical non-graphical forms. The graphical forms assembly process differs somewhat. Please click the **Help** button on applicable assembly windows for assistance.

The screen figures in this chapter are typical of what a Windows user with ProDoc installed on a local hard drive sees.

This chapter has been written for new and existing customers alike. So, many of the screen figures depict accurate information, typical of what you will encounter.

Document Assembly Wizard

ProDoc also has the **Document Assembly Wizard** to help you start assembling documents. This tool is geared towards new users and helps them assemble documents easily by taking them through a document assembly session step-by-step. If you want to use the **Document Assembly Wizard**, click **File → Document Assembly Wizard**. If you are currently using the ProDoc Quick Start Assistant, you may start the **Document Assembly Wizard** by selecting the **Documents and Forms** tab and clicking the **Create Documents Using Wizard** button.

Document Assembly Menu

Start ProDoc from the Windows 98/ME/NT/2000/XP/Vista Start button or from the ProDoc shortcut icon on your desktop. Users will be asked to log on with their initials in order to recall their unique ProDoc operating preferences. Chapter 3 discusses this configuration at greater length.

Select Assemble Documents

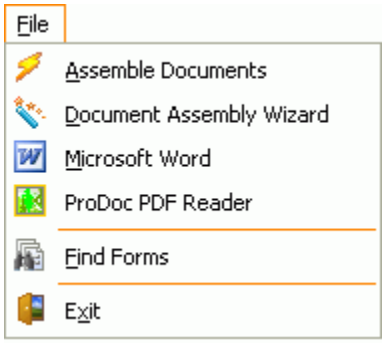


Figure 2-1, Assemble Documents Menu Choice

To begin assembling documents, click **File → Assemble Documents** or click the **Assemble** icon,

, on the left side of the toolbar.

Phase 1 - Establish Assembly Settings

The **Starting Document Assembly** window appears, shown at Figure 2-2. This window is used to start an assembly session. It lets you specify which case file to use, which forms to assemble, where to save completed documents, and which default answer set to use.

Note the flat blue button at the bottom of the window. You can click it to contract the window to only reveal Steps 1 and 2, or click it again to reveal all four steps. In later assembly sessions, you may wish to skip Steps 3 and 4. ProDoc remembers your choice when opening the window again.

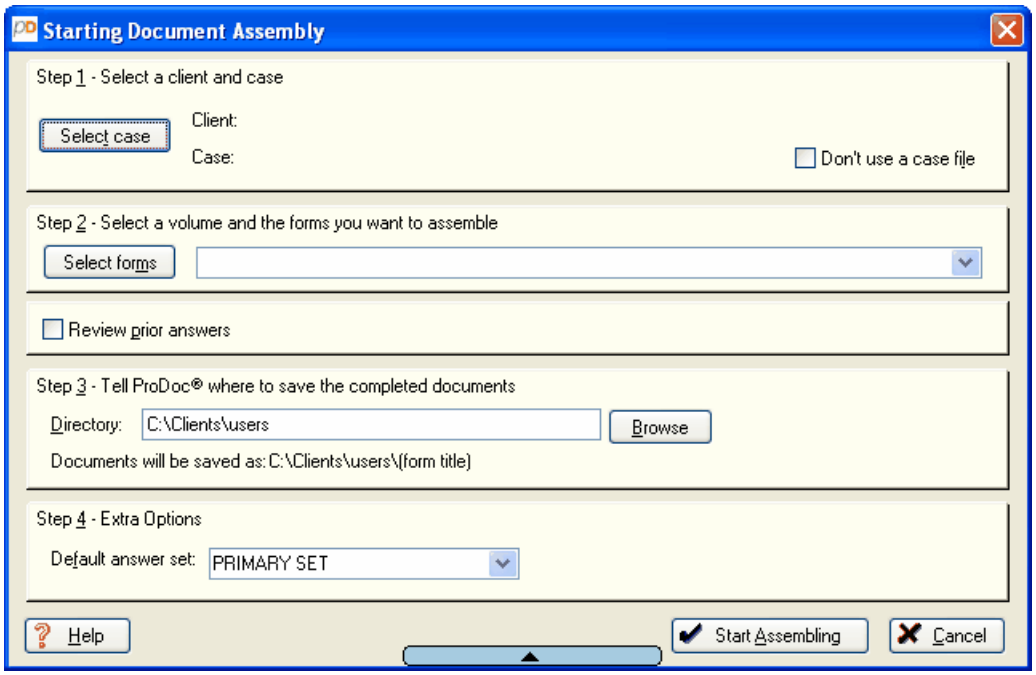


Figure 2-2, Starting Document Assembly Window

Step 1 - Select a client and case for storing your answers.

If you are a new customer and have no clients/cases entered, you should see Step 1A and Step 1B 19, then return here.

The ability to use case files for each client and case is one of the most powerful features of ProDoc. Answers you provide for clients/cases are automatically saved for use with documents you assemble later. This feature is described in detail in Chapter 3 of the software manual. We strongly recommend you **do not** check **Don't use a case file** for the following reasons:

- If you use a case file, ProDoc saves the answers you enter with the case. During subsequent case assembly sessions, these answers are displayed as defaults. This not only prevents re-typing; it also ensures consistent information entry when an item of information, such as a name, appears in more than one document.
- If you use a case file, you will have the option to save time by not reviewing answers to questions you answered during a previous assembly session using the same case.
- Timeslips users must use case files in order to generate slips from ProDoc as discussed in Appendix C 281 of the software manual.
- Lastly, using a case file makes it easy for you to organize your assembled documents by client

and/or case. You'll have a record of all documents prepared by case, and you can easily open the documents in your word processor.

Due to the above, we recommend you click the **Select case** button to open the client and case selection window, Figure 2-3.

NOTE: If desired, you can still start your assembly session without client and case by clicking in the box labeled **Don't use a case file**. You will then skip case selection.

The **Select a Case** window lists existing clients and all cases for the clients. Here, you can select cases; see and modify related client/case data; and create new clients and cases.

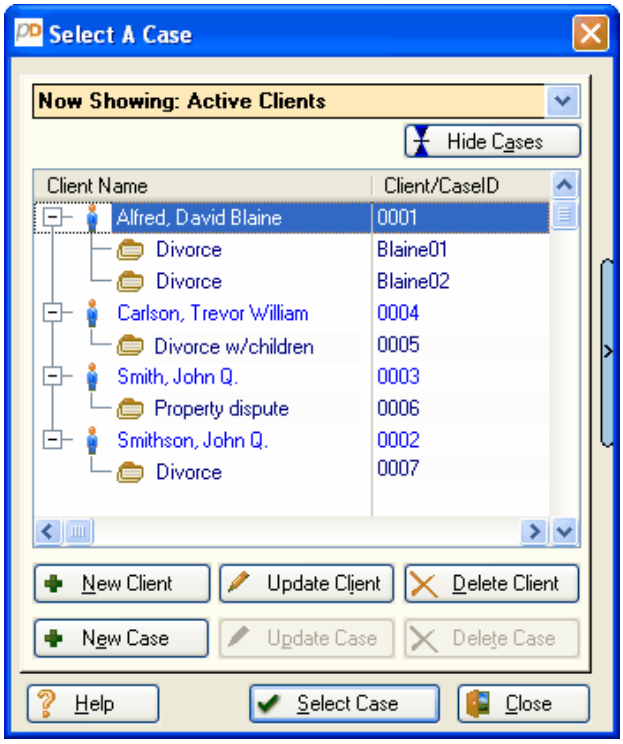


Figure 2-3, Select a Case Window

Figure 2-3 depicts the **Select a Case** window. Note the flat blue button at the right of the window. You can click it to expand the window to reveal client and case details. This is discussed in more detail in Chapter 3.

The client/case list will be blank for new customers until they have added new clients and cases. Then, as in Figure 2-3, it lists all previously entered cases for the selected client.

If you are a new customer with no clients listed, you will want to click the **New Client** button. Scroll down or see Step 1A 19 for more help. After you add the client, you can add a new case with the **New Case** button. Scroll down or see Step 1B 20 for more help. After you add the case, click **OK** to return to the **Select a Case** window.

To select a case for assembling documents, you can double-click a displayed case, or click a displayed case, then press the **Enter** key or click the **Select Case** button. You'll be returned to the **Starting Document Assembly** window, which displays the selected case.

To find a client/case that's not displayed:

- Use the keyboard locator. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard. If the desired client isn't found, you need to change the category of clients to display as detailed below.
- Use the **Now Showing:** drop down arrow. Cases are grouped under clients. You can choose the types of contacts/clients to display, including all contacts. These will be displayed with type icons of different colors on the window. The default is **Active Clients.**

  All Contacts

  Active Clients (default)

  Closed Contacts

Private Clients

Non-Clients

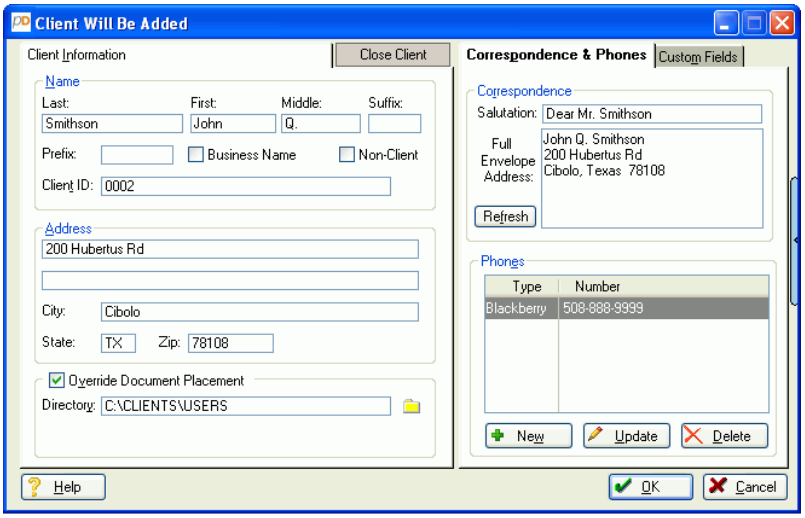
- Use the **Hide/Show Cases** toggle button to display or hide cases. You can use the ⊞ and ⊟ buttons to expand a client list to hide or show cases for the individual client.

Other functions of this window:

- Use the **Update Client** or **Update Case** buttons to perform updates.
- Delete clients and cases with the **Delete Client** and **Delete Case** buttons.
- Expand/contract the window by clicking the blue arrow button on the right side window border. When expanded, the window will display the highlighted client's correspondence and phone information.
- When expanded, you can click the **Send To** button to copy the client's address or name to the Windows clipboard, or to paste the client's address with salutation, address only, or name only to your word processor.
- You can use the **Client Custom Fields** 74 and **Case Custom Fields** 74 tabs to view these fields. If you want to change any information, click the **Update Client** or **Update Case** buttons on the left side of the window.

Step 1A - Adding a new client (when necessary)

If the client you want to assemble documents for has not yet been added to the system and you've selected the **New Client** button from the Select a Case window (Figure 2-3) to add the new client to the system, you will see a window (with blank fields) similar to the one shown in Figure 2-4. Notice the three tabs on this window: **Client information**, **Correspondence & Phones** and **Custom Fields.**



Expand/contract the window by clicking the blue arrow button on the right side window border. When expanded, the window will display the highlighted client's correspondence and phone information.

ProDoc will remember your choice and will subsequently open the window expanded or contracted.

Figure 2-4, Client Will Be Added Window

Fill in each field of the Client information tab as shown at the left of the window. Leave the **Override Document Placement** box unchecked to use the default directory you specified in document settings. Only check the Override box to specify a different directory for this particular client.

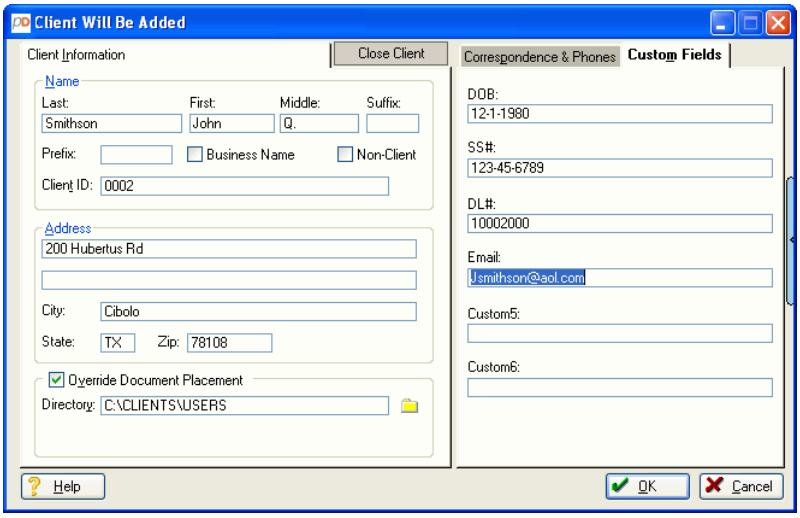
After completing the information on the left, click the **Refresh** button on the right to copy envelope addresses from the left to the right.

At the right side, add a **Salutation** for correspondence.

Enter phone information on the right side by clicking the **New** button. In the window that appears, select

the type of phone and enter the number in XXX-XXX-XXXX format.

Click the Custom Fields tab to reveal the custom fields entry box on the window, like the one shown in Figure 2-5.



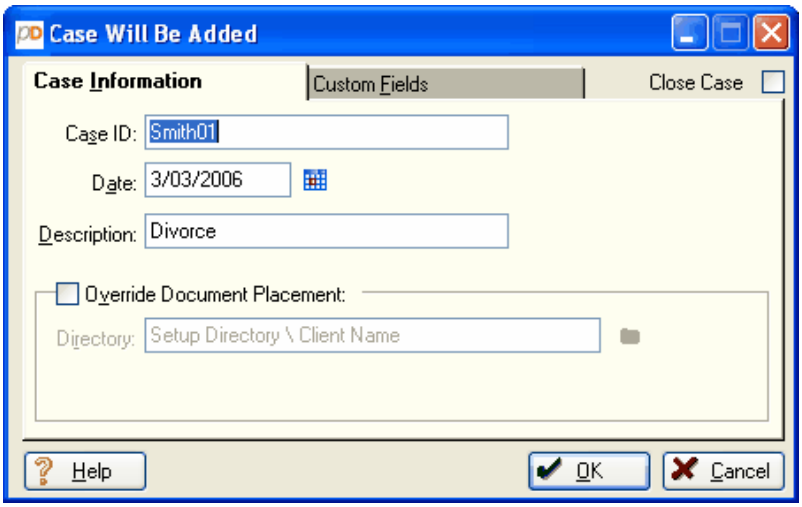
If desired, enter any Custom Fields information for the custom fields you have set up earlier as shown in Figure 2-5.

Setting up these fields is discussed in Chapter 3.

When you are finished, click the **OK** button. Then click the **New Case** button to proceed to adding a new case.

Figure 2-5, Entering Custom Fields

Step 1B - Adding a new case (when necessary)



Note: If you want to integrate Timeslips with ProDoc, you will need to use Case IDs. Activating Case IDs is explained in Chapter 3.

If you use **Case IDs**, enter the appropriate one here. The ID must either be blank or be a unique set of characters for each case. If your firm doesn't use Case IDs, you can turn this feature off from the **Main Menu**.

Figure 2-6, Adding a Case

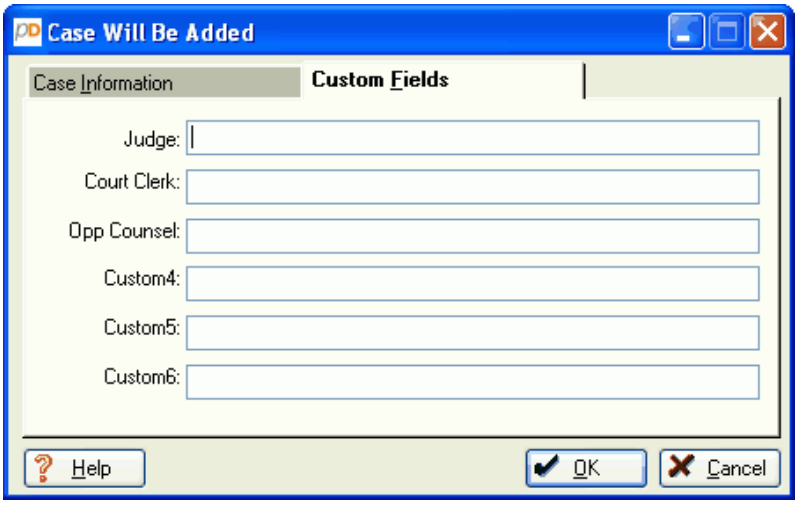
The **Date:** field will default to today's date. You can change the date by typing it in or clicking on the date selection button next to the field.

Enter a unique name or phrase in the **Description:** field to help identify this case. It can be any word, number or combinations. Common uses are short descriptions such as "Divorce" or "Estate Planning".

Only click the **Override Document Placement** and **Directory** box if you want to override the default setting for this particular case. You can type in the path or click the browse button. The Directory Browse Window will appear; use this to find the desired location.

Filename - This field will **not** be visible if you chose in setup to have ProDoc automatically "use the form title for filename". Use this field to enter a file name to store all files for the case. Specifying the filename here prevents manually typing it for each document assembly session.

Click the Custom Fields tab if you have set these up earlier and wish to enter appropriate information. A window similar to Figure 2-7 will appear.



In this example, Case Custom Fields were set up which included Judge, Court Clerk, and Opposing Counsel.

Type in the information as needed, then click the **OK** button to return to the **Select a Case** window.

Click the **Select Case** button on that window to use the new client and case for document assembly.

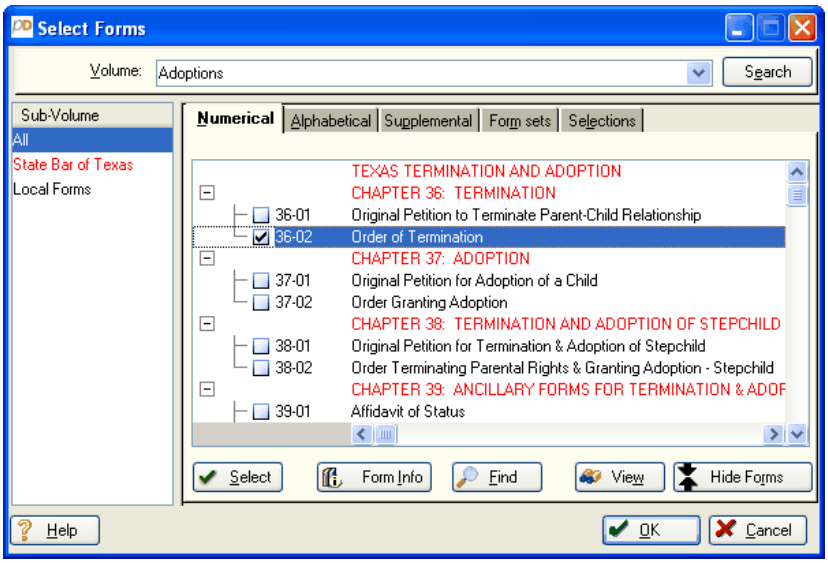
Figure 2-7, Enter Case Custom Fields Window

NOTE: If you are finished with adding a new client and adding a new case, you may want to either **go back to Step 1** 17 to review the process for selecting cases, or move on to Step 2 to continue to assemble your document(s).

After selecting the client and case, you will be returned to the Starting Document Assembly window. Client and Case entries are now shown. Proceed to step 2.

Step 2 - Select a volume and the form(s) you want to assemble.

If the desired volume is not already displayed, click the **Select Forms** button. A window appears similar to Figure 2-8.



You may select as many forms at one time as desired. When a form is selected, a check mark appears in the box to the left of the title. To select or deselect a form, either click the form title or highlight it and then click the **Select** button. You can deselect it the same way.

Read on for a detailed description of using this window's tools.

Figure 2-8, Select Forms Window

First, select a **Volume** by clicking the drop-down arrow field. A list of all installed volumes will appear. Click the one representing the area of law you want to use.

Use the **Search** button at the top right of the window to open a search dialog window. At that window, you can enter words or phrases likely to be in the forms you want to find. After selecting a form from that window, it will be marked as selected in the Select Forms window.

Tools for Displaying and Finding a Form. The tabs across the top of this window provide several unique options:

Numerical - Displays forms in numerical order, organized by area of law. This is the default display.

Alphabetical - Displays forms in alphabetical order based on their title. The form number appears to the right of the form's title.

Supplemental - Shows a window for supplemental forms for assembly for that volume of law. Supplemental forms are forms you create to add to the ProDoc software's forms library.

Form Sets - Shows a window for form sets which have been created for that volume of law. Form sets are collections of forms that allow a single item to select several forms at the same time, saving you time in selecting a number of forms in a volume.

Selections - Displays forms currently selected for action. The **Clear Selections** button can be used to deselect a highlighted form.

The **Numerical** and **Alphabetical** selections also contain the following options at the bottom of the window:

Form Info - Brings up detailed information about the highlighted form.

Find - Brings up the find form dialog window to search for forms containing a specific word or phrase.

View - Displays the highlighted form with all language inserted and blanks inserted where client/ case information would be located. This feature is useful for viewing a form without assembling it.

NOTE: If you need to change to a different volume, click the drop-down arrow field labeled **Volume:** and choose another from the list.

Tree Control

The **Numerical** display tab includes a standard Windows tree control which is used to hide and display the forms contained in each chapter of a volume. It can be especially useful when dealing with a very large volume. When you contract the tree, only the chapter headings are displayed. This makes it easier to scroll through the list looking for the chapter you need. After finding it, you can expand that chapter and select the appropriate form.

- To contract the entire form list, click **Hide Forms**.
- To expand the entire form list, click **Show Forms**.
- To contract a single chapter, click the ⊟ box.
- To expand a single chapter, click the ⊞ box.

When you have finished selecting one or more forms, proceed to Step 3.

After selecting your form(s), you can either accept answers you've already entered or review each question and answer. Click the **Review prior answers** box to go over any previously saved answers and make changes before assembling documents. If you leave the box unchecked, only those questions not previously answered will be asked, and the answers previously entered will be used without review.

An arrow button at the bottom of the **Starting Document Assembly** window lets you hide or show Steps 3 and 4, which deal with document location and default answer sets.

Step 3 — Tell ProDoc where to save the completed documents.

Normally, you'll want to use the displayed directory, which will be the default settings you chose in your setup preferences.

- The **Directory** field lists the drive and directory where assembled documents will be saved. If you prefer a different directory for these documents, type it in or click the **Browse** button to the right of the box and select the drive and directory from the **Directory Browse** window.
- The **Documents will be saved as:** entry shows the path and confirms whether the actual form title or another name will be assigned.

> **NOTE:** The filename will usually end with **.doc** for Microsoft Word and **.wpd** for WordPerfect, depending on your selected word processor. These settings are discussed in detail in Chapter 3.

Step 4 - Verify other assembly options.

The **Default Answer Set** field is provided to let you designate optional default answer sets (discussed in Chapter 3) for this document assembly session.

If you have created any alternate sets, select the default answer set you want to use from this list by clicking the drop down arrow at the right of this field. Otherwise, ProDoc will use your **PRIMARY SET**.

Figure 2-9 provides example entries following the completion of the foregoing steps 1-4:

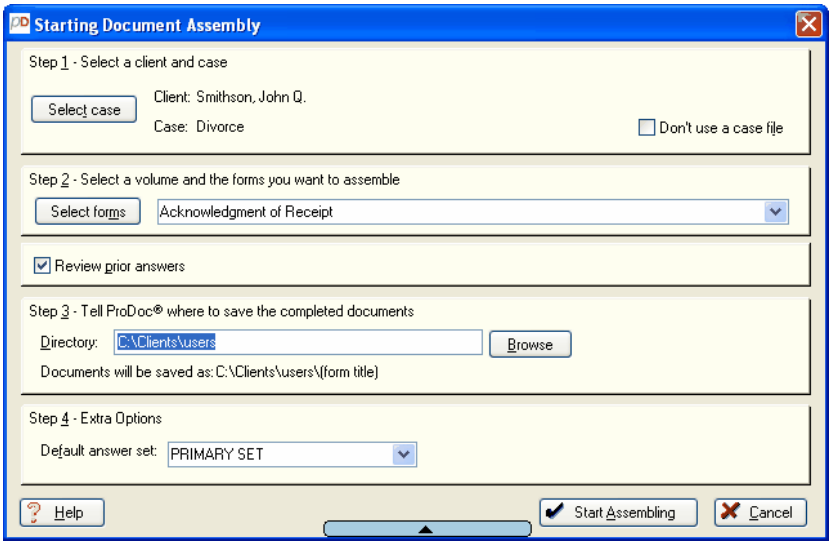


Figure 2-9, Completed Starting Document Assembly Window

Figure 2-9 shows the completed assembly session settings.

Now, you're ready to start assembling. Click the **Start Assembling** button in the lower right hand corner of the Starting Document Assembly window to begin document assembly.

Phase 2 - Answer "Assembly" Questions

After clicking the **Start Assembling** button, you will see a Volume Banner Screen similar to the one in Figure 2-10.

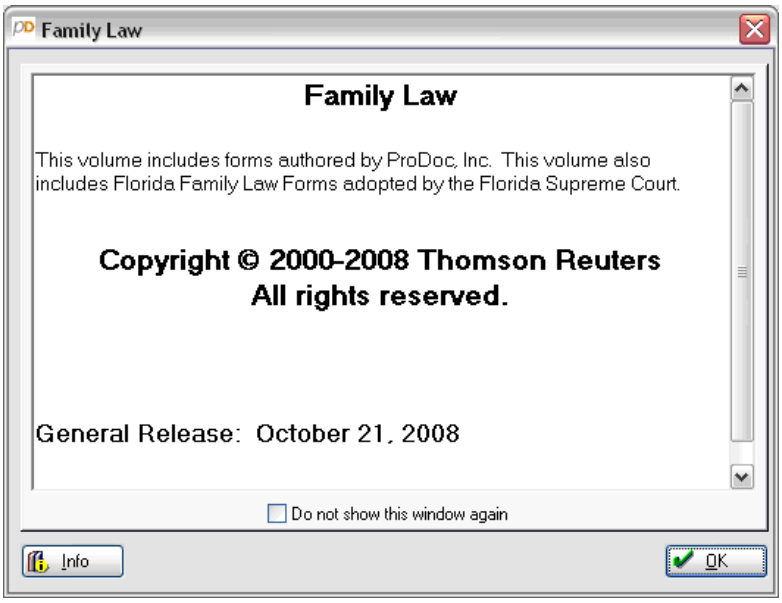

Family Law
Family Law
This volume includes forms authored by ProDoc, Inc. This volume also includes Florida Family Law Forms adopted by the Florida Supreme Court.
Copyright © 2000-2008 Thomson Reuters
All rights reserved.
General Release: October 21, 2008
Do not show this window again
Info
OK

Figure 2-10, Banner Screen

Every Volume has a banner screen to provide information about the volume.

You can read it, choose to get more information on the listed volume by clicking the **Info** button, or click the box next to **Do not show this window again** to avoid seeing it again.

Select **OK** to continue to the next window.

Questions used to assemble your document will be presented in various windows similar to the one shown in Figure 2-11. Note that you can click the flat blue button labeled **Show** or **Hide Explanation** to see or hide an explanation for the question.

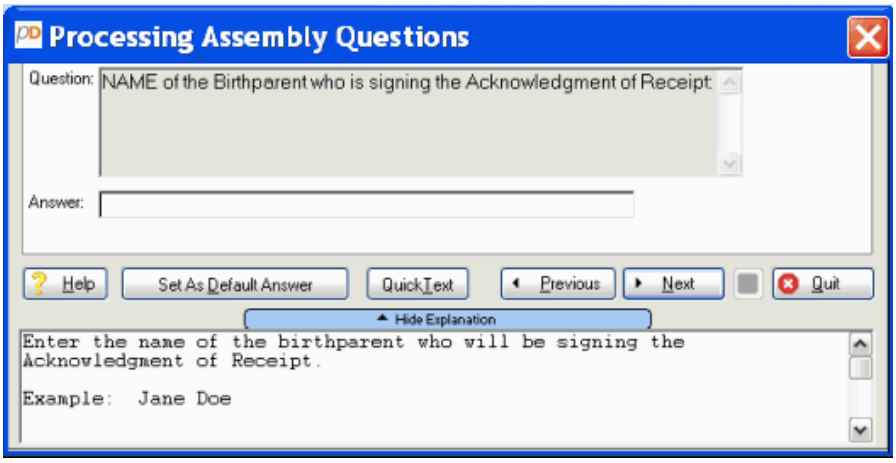


Figure 2-11, Processing Assembly Questions Window

Simply complete the **Answer** field and click the **Next** button to proceed to the next question window.

NOTE: The questions are displayed in one of several formats, including Fill-in-the-Blank context, Fill-in-the-Blank non-context, Single and Multiple Choice, Combo, List and Table as follows: (see below)

Fill-in-the-Blank questions allow you to simply type in your answer (such as a client's name or street address). They may be presented in either a context or non-context window. Click the **Next** button after you have typed in your answer.

Single Choice questions present you with a list of items from which you select only one. To select an item, highlight it, then press **ENTER** or click the **Next** button.

Multiple Choice questions present a list of items from which you select any number of items or none at all. To select an item, highlight it, then press **SPACE** or click the **Select** button. You can also use your mouse. When you have made all of your selections, click the **Next** button.

Combo Questions present you with a list of likely answers and an entry field. Your answer is the text

that you put in the entry field. An answer from the list is put into the entry field when it becomes highlighted. You are not limited to the answers in the list. You may type whatever you want into the entry field.

List Questions are used to fill in answers in lists, and you can add rows/answers, edit answers in previous rows and move rows as needed. One example of this is entering a list of names of minor children.

Table Questions allow you to enter answers in rows and columns of a table, selectively edit or delete any entry, and move rows up and down in the table.

Validation for Answers: For answers which have special requirements, ProDoc checks the answers against specific criteria to minimize data entry and logic errors. Follow the guidance in the validation window to correct the answer and move to the next answer field.

Options Buttons. Depending on the type of question, the following buttons are available:

Help - Displays the help topic for the window.

Set as Default Answer - Sets the current answer as the default answer for the active question. To use this feature, type in the answer you want to use as a default and click the button. Verify whether or not you want this answer as the default by clicking **Yes** or **No** on the resulting window.

NOTE: Several answers taken from **Firm Information** fields are handled differently; click the **Firm Information in Answers** 75 link to see how to set default answers for these items.

QuickText - only visible on fill-in-the-blank answers. Click the button to bring up the QuickText window, where you can select one of the entries as the answer to your question. You can always insert QuickText by using the shortcut designated when the entry was created.

Previous - displays the previous question.

Next - displays the next question.

Save and Continue - saves all answers you previously entered and accepted by clicking **Next.** Use this button to ensure your answers are saved in the event of a computer malfunction during an assembly session. Clicking this button does **not** save the currently displayed answer because it has not yet been accepted.

Quit - Exit the current question. If assembling a document, this button brings up the session quit options window to determine where to proceed after exiting.

Show or Hide Explanation - Provides helpful information about the current question.

Auto - will not be available for every window. Selecting this option tells ProDoc to automatically answer this and all remaining questions with the placeholder specified in system **Assembly Settings.** This will create a finished document with the placeholder inserted in all locations where you did not actually enter an answer. Later, you can reassemble the document and fill in the blank answers or replace the placeholders with answers in your word processor. Reassembling is best because it adds saved answers to your case database that can be used in future documents.

Phase 3 - Answer "Merge" Questions

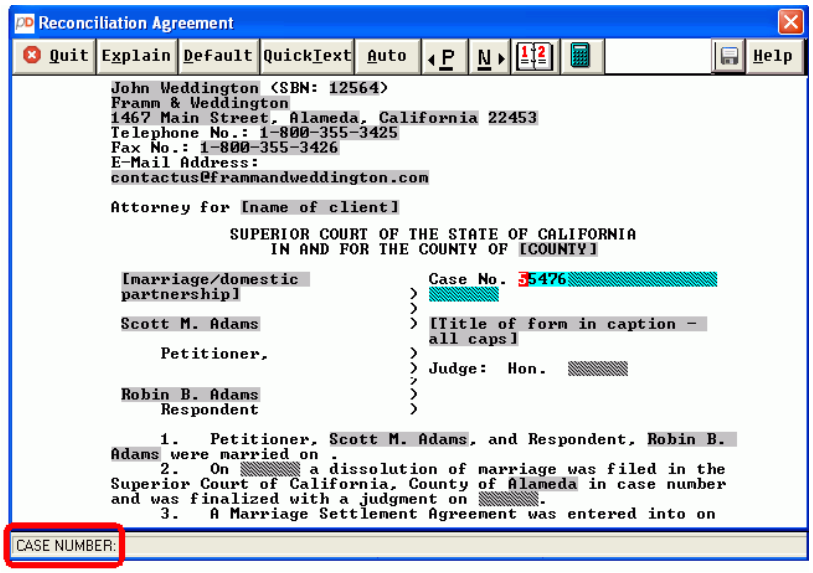

Reconciliation Agreement
Quit
Explain
Default
QuickText
Auto
P
N
Help
John Weddington (SBN: 12564)
Framm & Weddington
1467 Main Street, Alameda, California 22453
Telephone No.: 1-800-355-3425
Fax No.: 1-800-355-3426
E-Mail Address:
contactus@frammandweddington.com
Attorney for [name of client]
SUPERIOR COURT OF THE STATE OF CALIFORNIA
IN AND FOR THE COUNTY OF [COUNTY]
[marriage/domestic partnership]
Case No. 55476
Scott M. Adams
[Title of form in caption - all caps]
Petitioner,
Judge: Hon.
Robin B. Adams
Respondent
1. Petitioner, Scott M. Adams, and Respondent, Robin B. Adams were married on .
2. On a dissolution of marriage was filed in the Superior Court of California, County of Alameda in case number and was finalized with a judgment on .
3. A Marriage Settlement Agreement was entered into on
CASE NUMBER:

Figure 2-12, Context Display Window

Figure 2-12 shows the document after it has been pre-assembled with necessary clauses. You now progress through the document by completing the blank fields with information for the specific client and case.

For each blank, a question is displayed at the bottom left of this window (circled in red). You can also click **Explain** on the menu bar for more help on the question.

Type your answer in the shaded fields and then press **TAB, Alt+N**, or click the **N** button to move to the next field. You will be prompted to enter information in the bottom left corner of your screen as noted in Figure 2-12. After you enter the information in the last field and press **Tab**, ProDoc will close the merge phase and save your document. If you have chosen the option in setup preferences, ProDoc will then open the document in your word processor.

Validation for Answers: For answers which have special requirements, ProDoc checks the answers against specific criteria to minimize data entry and logic errors. Follow the guidance in the validation window to correct the answer and move to the next answer field.

A description of controls on this window follows.

Navigating From Field To Field. To move forward to the next field:

- Press the **Tab** key,
- Click **N** on the menu bar, or
- Press **ALT + N**.

To move backward to the previous field:

- Press the **Shift + Tab** keys,
- Click **P** on the menu bar,
- Press **ALT + P**.

Menu Options

Quit - Exit the current document. Brings up the **Session Quit Options** window to determine where to proceed after exiting.

Explain - Provides help information about the active question.

Default - Sets the current answer as the **default answer** for the active question. To use this feature, type in the answer you want to use as a default, then select **Default** from the menu. This brings up a window to verify you want to set the answer as a default.

NOTE: Several answers taken from **Firm Information** fields are handled differently; click the Firm Information in Answers 75 link to see how to set default answers for these items.

QuickText - Accesses the **QuickText** browse window to paste entries into the document.

Auto - Tells ProDoc to automatically answer this and all remaining questions with the placeholder specified in system **Assembly Settings.** This will create a finished document with the placeholder inserted in all locations where you did not actually enter an answer. Later, you can reassemble the document and fill in the blank answers or replace the placeholders with answers in your word processor. Reassembling is best because it adds saved answers to your case database that can be used in future documents.

P - Backs up to the previous field.

N - Advances to the next field.

Save and Continue - saves all answers you previously entered and accepted by clicking **N** or pressing the **Tab** key. Use this button to ensure your answers are saved in the event of a computer malfunction during an assembly session. Clicking this button does **not** save the current field's displayed answer because it has not yet been accepted.

Help - Brings up the help topic for this window.

NOTE: Cut, copy, and paste actions can be performed from this window.

Phase 4 - Saving Documents

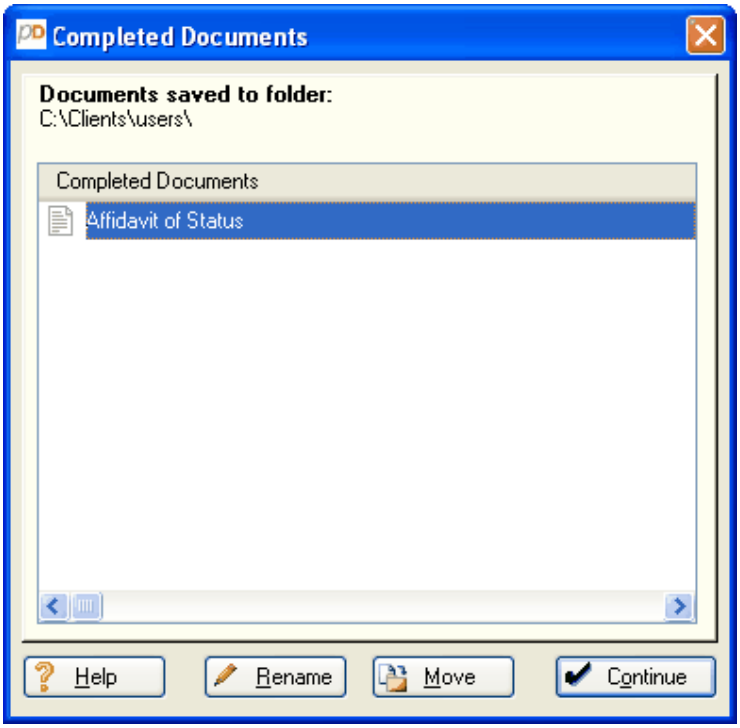


Figure 2-13, Completed Documents Window

After all of your selected documents have been assembled, a Completed Documents window (Figure 2-13) appears with a list of completed documents showing the filenames under which they were stored. Note the filename(s) and file location, then click the **Continue** button.

A **Rename** button is provided should you want to alter any aspect of the document path and name. We recommend that you avoid renaming at this stage of document assembly.

A **Move** button is also available for use if you want to store the document in a different folder than the default.

Phase 5 - Edit and Save Completed Documents

ProDoc will automatically send the first completed document to your word processor for final review, editing, re-saving and printing.

NOTE: Microsoft Word users saving a document will most likely encounter a pop-up window

asking confirmation if you want to save it as a Word document. If you encounter this window, it is best to save the document in Word format in order to preserve the formatting integrity of the edited document. WordPerfect users should do likewise and save in their native version.

If you are using a recent version of WordPerfect or Microsoft Word, ProDoc will insert the document's name into the "recently used files list" at the File drop down menu if you enabled this feature in setup. This makes it very easy to find and open recently saved documents. If you assembled more than one document, you can open successive documents in the same fashion. If you have not enabled this feature in setup, you must find and open the files in the location where you told ProDoc to save your completed documents.

Now that you know how to assemble documents with ProDoc, proceed to Chapter 3 to learn more about how to navigate the program's various menu items and buttons.

NOTE: Assembling and printing graphical forms differs from the foregoing procedure. ProDoc uses an entirely different assembly technique which includes sending finished graphical forms to your default PDF reader rather than sending them to your word processor.

Chapter 3, Main Menu

The Main Menu

This chapter helps you learn how to navigate through ProDoc by providing a description of the various options and features available from the main screen menu and **toolbar** 29. Figure 3-1 shows the main screen menu on a ProDoc installation on a computer which also has the Small Office Suite program installed.

Figure 3-1, Main Menu

Also, ProDoc has many windows which list information you scroll through, like your list of clients and the list of forms in a volume. These lists are called Browsers because you can browse through the list and make a selection.

Most of the ProDoc software's browse lists include "locator fields". This means when the list is selected, you can simply type the first few letters of the selection you want and ProDoc will instantly jump to it. As you type letters, they are displayed in the locator field (usually located above the top left corner of the list) so that you can see what you have typed. For example, if you want to jump to form "3-16" in the form selection screen, simply type "**3-16**". When you enter "**3**", ProDoc will jump to form 3-1 and the locator field will display "3". As you continue typing "**-16**", ProDoc will jump to form "3-16" and that is what is displayed in the locator field. If you want to jump to a different entry, you will need to clear the locator field. To do this, simply press **Backspace** to delete each letter or press the up or down arrow key once. For example, after you type "**Smi**" to jump to "Smith" you will need to clear the locator field before you can type "**Ada**" to jump to "Adams".

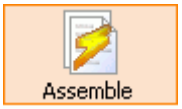
NOTES: The screen figures in this chapter are typical of what a Windows 98/ME/NT/2000/XP/Vista user with ProDoc installed on a local hard drive sees.

This chapter has been written for new and existing customers alike. So, many of the screen figures depict accurate information, typical of what you will encounter.

Toolbar Buttons

Figure 3-1A, Main Menu Toolbar

The ProDoc main window normally has five icon buttons displayed on the main window toolbar. This changes to six buttons if the Small Office Suite is installed, which is the case in Figure 3-1A. If the Small Office Suite program is not installed, then that particular icon will not be displayed. Click the buttons below to get more detailed help. Click the Back Arrow or Contents tab to get back to this section.



Click to begin a document assembly session.

Click to start your preferred word processor (Microsoft Word or WordPerfect). This button switches to or opens your word processor.

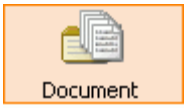
Click to open the **Small Office Suite (SOS)** program if you have it installed. This program can help you:

- Track more detailed information regarding your clients and cases
- Track time and appointments
- Manage billing
- And much more!

To find more information about SOS, please call the Sales Department at **800-759-5418**.

Click to open the **Certified Mailer** program. It interacts with your databases to easily print certified mailer labels.

Click to open the **Client/Case Manager**, a central management area for clients and cases. You can add, change and delete client and case information.



Click to open **Document Manager**, the central document management area, where you can add, change, move and delete completed documents.

File Menu

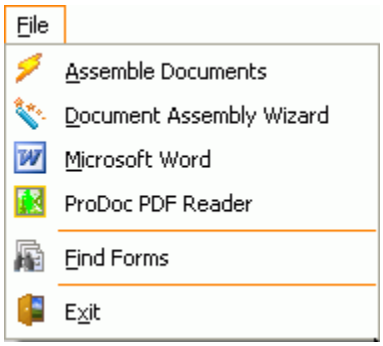


Figure 3-2, Main Menu File Drop-Down Box

Assemble Documents starts a document assembly session. This selection performs the same function as the Assemble toolbar button,

. Chapter 2 explains the document assembly process in detail.

Document Assembly Wizard takes you step-by-step through the document assembly process. The

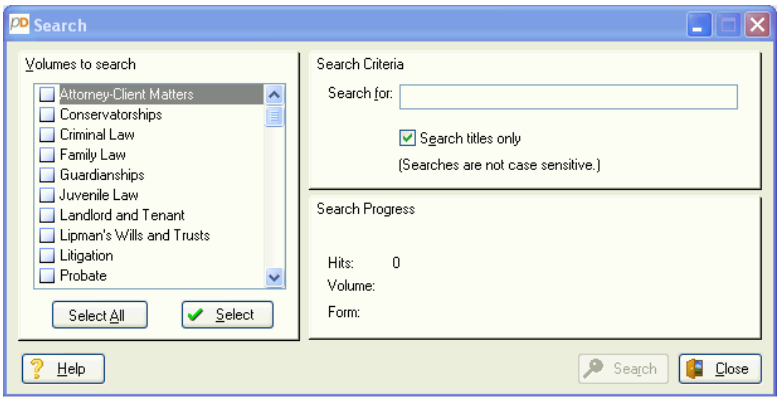
wizard is especially useful for new ProDoc customers because it provides an easy-to-use interface for creating new documents. You may use the **Document Assembly Wizard** in the Quick Start Assistant or by clicking **File→ Document Assembly Wizard** on the ProDoc menubar.

Microsoft Word lets you open or switch to your preferred word processor. The word processor that starts (either Microsoft Word or WordPerfect) depends upon which is installed and which you chose during setup. This selection also switches to your word processor if it's open. This selection performs the same function as the Word Processor toolbar button,

.

ProDoc PDF Reader opens the ProDoc software's built-in PDF file reading program. This program also has a typing feature for filling in blanks in PDF forms. You can designate this program as your default viewer for all PDF documents and use it to view and print completed graphic documents in ProDoc.

Find Forms brings up the form search window shown in Figure 3-3. You can search for forms by typing a key word or phrase in the **Search for:** field. You can search either in specific volume(s) or throughout all volumes.



You must first select one or more volumes from the list on the left by clicking the title, box or the **Select All/Select** buttons. If you cancel the search after one or more matches have been found, you will be asked whether you would like to view a list of the matches found up to that point.

Figure 3-3, Search Window

Exit closes ProDoc. If "Auto Backup at exit" is selected in Options and Settings, you will be prompted for a backup choice. If you are running SOS, you'll likely want to backup your files with that program instead of using ProDoc.

Edit Menu

Figure 3-4, Edit Menu Drop-Down Box

Cut, Copy and **Paste** are shown in Figure 3-4. These choices will be available when you are working on a form or document, or when you are entering information into any available text field in ProDoc. These choices will be grayed out when they cannot be used. Each of these selections performs the desired action only on the text you have selected.

Cut moves selected text from your document to the Windows clipboard and deletes it from your document.

Copy copies selected text to the Windows clipboard.

Paste inserts selected text from the Windows clipboard to the cursor position in your document.

Clients and Cases Menu

Figure 3-5, Clients & Cases Drop-Down Box

Client/Case Manager brings up a management window where you can add, delete, search for or select clients and cases as well as modify specific client and case information. This selection performs the same function as the Client/Case toolbar button,

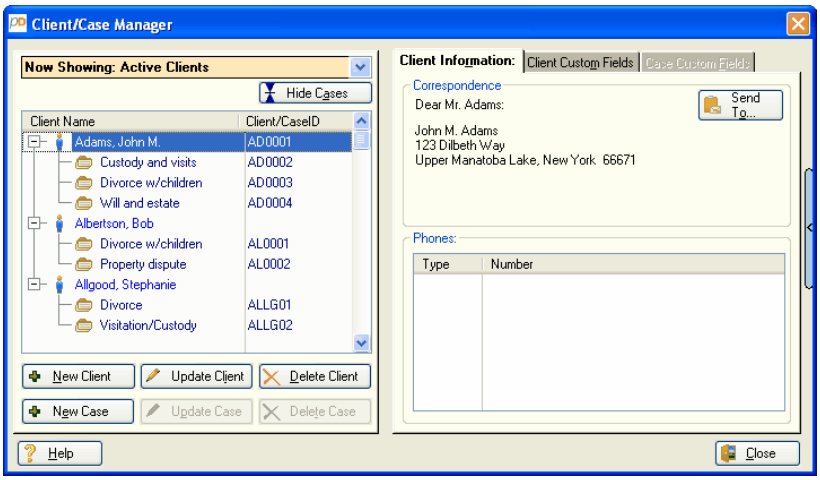
.

One of the most important features of ProDoc is its ability to build a case file for saving your answers. Using this feature allows you to reuse information entered in earlier assembly sessions every time you produce documents for that case. As the case progresses, you find that you enter less and less information in order to produce finished documents. For example, once you enter the county where the suit is filed, dates, names of the parties, addresses, etc., that information is automatically available for subsequent documents and does not have to be retyped. The answers you entered in previous assembly sessions will be automatically displayed as the proposed answer whenever appropriate to the question.

You can have an unlimited number of clients in ProDoc and each client can have an unlimited number of cases. Note: Normally, you will enter new clients and/or cases during a document assembly session as discussed in Chapter 2.

While a case file should normally be created for a single legal matter (such as Estate Planning or Divorce), you are not restricted to using only one ProDoc volume. If necessary, you can assemble documents from several volumes in a single case file.

Clicking **Client/Case Manager** brings up a window like the one shown in Figure 3-6. This window displays the clients you have entered, the cases, phones, correspondence addresses and custom fields for each client and case. It allows you to add, update and delete these items.



The client/case list will be blank for new customers until they have added new clients and cases. Then, as in Figure 3-6, it lists all previously entered cases and clients.

Note the flat blue button at the right of the window. You can click it to expand the window to reveal client and case details or contract it to only reveal clients and cases.

Figure 3-6, Client/Case Manager Window

Left side of Client/Case Manager Window (visible in both basic and expanded mode)

Clients, cases and unique IDs for each will be displayed alphabetically by last name. The IDs appear only if you have chosen to use these in setup preferences.

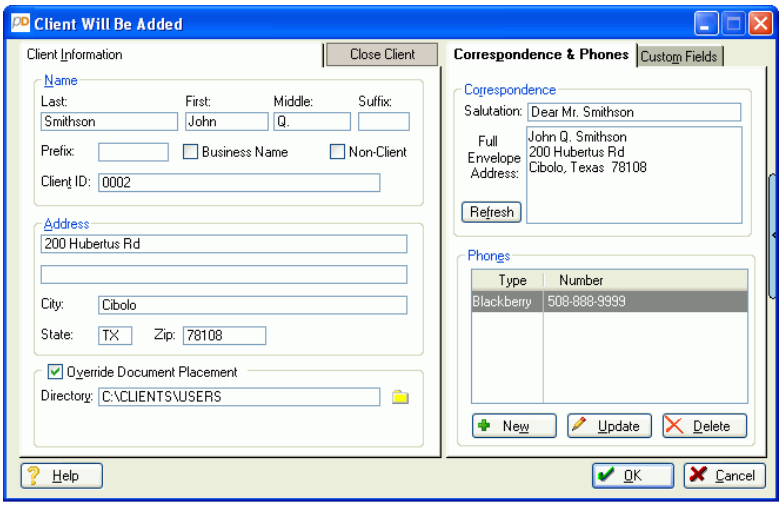
The **Now Showing:** box tells you what types of contacts or clients are displayed. Click the drop down arrow to select the type to display:

- **All Contacts**
- **Active Clients (default)**
- **Closed Contacts**
- **Private Clients**
- **Non-Clients**

Use the **Hide/Show Cases** toggle button to display or hide cases. Click ⊞ or ⊟ to hide or show cases for individual clients. You can drag the vertical line column separator left and right to allow more room for a particular column. You can also use the scroll bar at the bottom of the section to move the column view to the right.

To add a new client or update the information for the highlighted client, click **New Client** or **Update Client**. This brings up the **Client Information Dialog** window where you perform the desired action. You can also double-click a client to update the information for that client. Right-clicking on a client brings up a pop-up menu corresponding with the **New**, **Update** and **Delete** options displayed. You can also click **Delete Client** to remove the client from the system.

When you double-click a client or click the **New Client** or **Update Client** buttons, a Client Information Dialog window similar to Figure 3-7 will appear.



Information is displayed in three tabs: Client Information, Correspondence and Phones and Custom Fields.

To add or edit client information, click the appropriate field or press the **Tab** key to move from one field to the next.

Figure 3-7, Client Dialog Window

The **Client Information** tab of the Client Dialog Window is where basic information about the client is maintained such as shown in Figure 3-7. Most of the information in this screen is self-explanatory, such as name, address, and correspondence. Client ID's are unique letter/number combinations that identify each client (similar to how a social security number identifies a person). If you do not use this feature in your practice, you can turn it off in ProDoc under the **Options** menu as discussed elsewhere in this chapter. When this feature is turned off in ProDoc, the client ID field is not displayed.

NOTE: If you will use Timeslips with ProDoc, you should assign Client IDs and Case IDs. You should also ensure your Client IDs are no more than 30 characters long due to Timeslips program limitations on that program's corresponding Nickname fields.

The **Close Client** button will only appear when you are updating an existing client. You can use it to change your client's status. If you are updating a client with a status of closed, the button will be labeled **Re-Open Client**. If you click this button, the client's status will change to open.

NOTE: At the bottom of this window is a Directory field which displays the default location where your completed documents will be saved. Leave the **Override Document Placement** box unchecked to use the default directory you specified in the **Customize /Options/Completed Document** settings. Check the box to specify a different directory for this client.

When you click the **Custom Fields** tab, the Custom Dialog window like the one shown in Figure 3-8 will appear. Just fill in the custom fields provided (if any were established by you in system options settings).

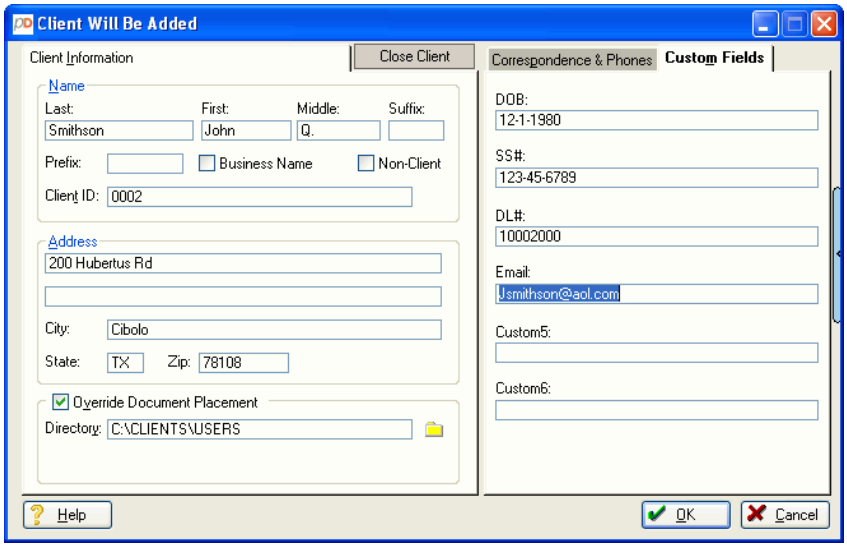


Figure 3-8, Client Custom Fields Tab

The same functions on the left side of the Client/Case Manager Window explored earlier for clients also apply to working with cases. Double-click a case or highlight it and click **Update Case** to reveal the **Case Dialog Window**, where you perform the desired action. Clicking **New Case** also reveals the window. Clicking **Delete Case** removes the case from the system.

When you double-click a case or click the **New Case** or **Update Case** button, a window similar to Figure 3-9 appears.

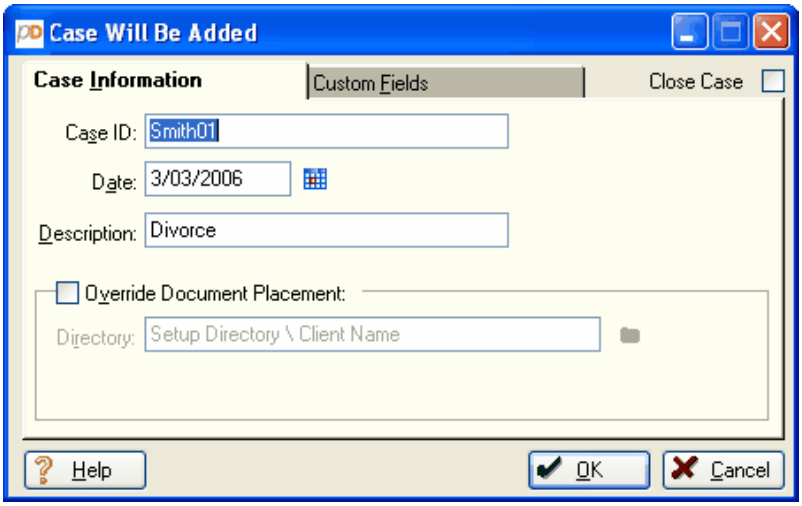


Figure 3-9, Case Dialog Window

If you use **Case IDs**, enter the appropriate one here. The ID must either be blank or be a unique set of characters for each case. If your firm doesn't use Case IDs, you can turn this feature off from the **Main Menu**.

NOTE: If you want to integrate Timeslips with ProDoc, you will need to use Case IDs. Activating Case IDs is explained in the Clients & Cases Settings 73 section in Chapter 3.

The **Close Case** box will only appear when you are updating an existing case. You can use it to change the status of the case.

The **Date:** field will default to today's date. You can change the date by typing it in or clicking on the date selection button next to the field.

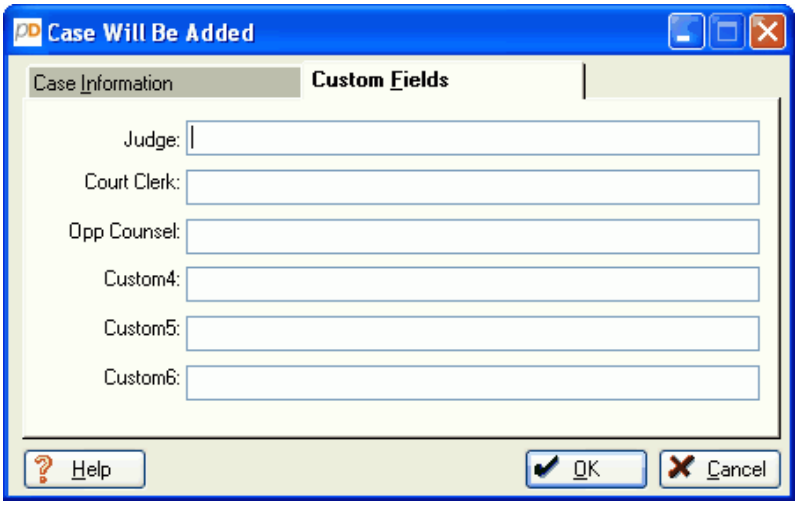
Enter a unique name or phrase in the **Description:** field to help identify this case. It can be any word, number or combinations. Common uses are short descriptions such as "Divorce" or "Estate Planning".

Only click the **Override Document Placement** and **Directory** box if you want to override the default setting for this particular case. You can type in the path or click the browse button. The **Directory**

Browse Window will appear; use this to find the desired location.

Filename - This field will **not** be visible if you chose in setup to have ProDoc automatically "use the form title for filename". Use this field to enter a file name to store all files for the case. Specifying the filename here prevents manually typing it for each document assembly session.

Click the **Custom Fields** tab if you have set these up earlier and wish to enter appropriate information. A window similar to Figure 3-10 will appear.



In this example, Case Custom Fields were set up which included Judge, Court Clerk, and Opposing Counsel.

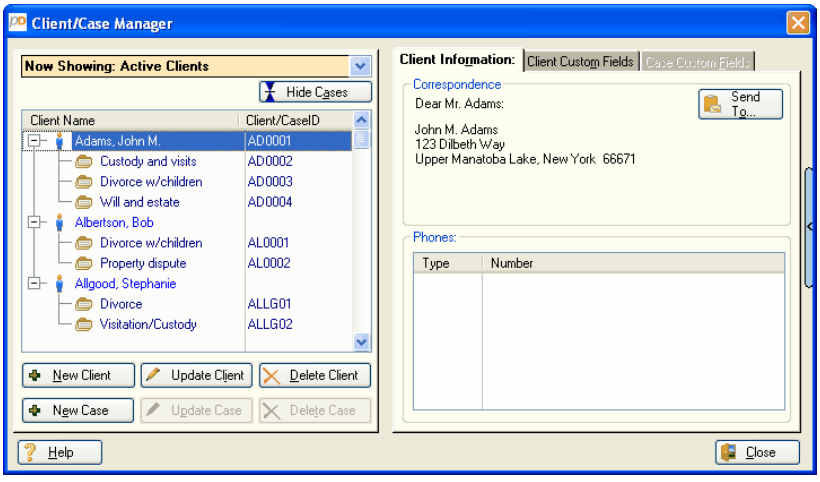
Type in the information as needed, then click the **OK** button to return to the **Select a Case** window.

Click the **Select Case** button on that window to use the new client and case for document assembly.

Figure 3-10, Enter Case Custom Fields Window

Right side of Client/Case Manager Window

You can view detailed client correspondence, telephone, and custom field information on the right side of the Client/Case Manager window, depicted in Figure 3-11. While working on this window, if the right side is not already displayed, click the arrow button on the right border of the window.



The **Client Information** tab displays salutation, mailing address and phone information.

Click the **Send to...** button to reveal a pick list of actions involving this information. Choosing **Paste** functions opens your word processor and pastes the information. **Clipboard** functions copy information to the Windows clipboard for later pasting.

Figure 3-11, Client/Case Manager Window, Right Side

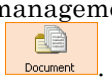
You can double-click any phone entries to edit the phone type and number. To edit any other information, click the **Update Client** or **Update Case** buttons on the left side.

Click the **Client Custom Fields** and **Case Custom Fields** tabs to display information already entered in the custom fields designated during setup or in a later options setting. If you want to change any

information, you must click the **Update Client** or **Update Case** buttons on the left side of the window.

Figure 3-12, Clients & Cases Drop-Down Box

Document Manager brings up a list of the documents, organized by client and case, which you've already assembled, and any additional files that you have selected for file management within ProDoc.

This selection performs the same function as the Document toolbar button, 

. You can also work with any documents in your computer and/or network that you can locate with Windows Explorer. Selecting this menu item or button brings up a window similar to Figure 3-13.

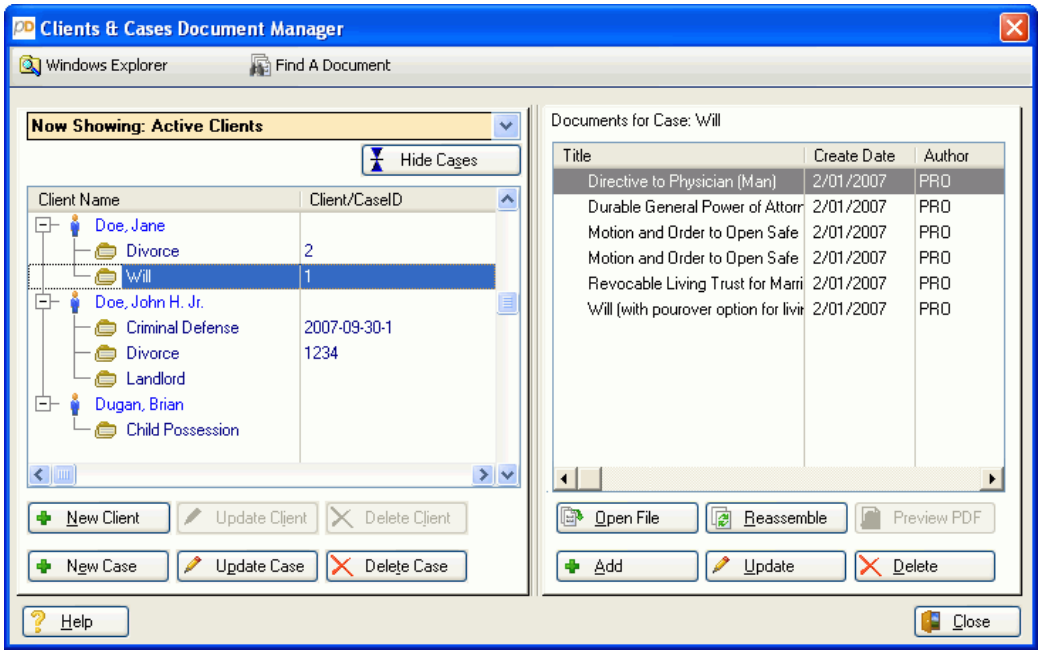


Figure 3-13, Clients & Cases Document Manager Window

This window is resizable to let you see more information. You can click and drag any vertical line separating columns to allow more or less room for each column. Where scroll bars are displayed, you can also scroll up or down through the lists or scroll the view from left to right.

Left side - Clients and Cases

> **NOTE:** The display, navigation, client and case functions included in this window are the same as those covered in detail in the Client/Case Manager section of this chapter.

Click the links to jump back to the applicable portions of the Client/Case Manager section:

Adding and Updating Clients 33
Adding and Updating Cases 35

The upper left side of the Document Manager window lists the clients alphabetically by last name along with client and case IDs (if assigned).

The **Now Showing:** box tells you what types of contacts or clients are displayed. Click the drop down arrow to select the types to display:

- **All Contacts**
- **Active Clients (default)**
- **Closed Contacts**
- **Private Clients**
- **Non-Clients**

Use the **Hide/Show Cases** toggle button to display or hide cases.

Clients, cases and unique IDs for each will be displayed alphabetically by last name. The IDs appear only if you have chosen to use these in setup preferences.

Click ⊞ or ⊟ to show or hide cases for individual clients.

To add a new client or update the information for the highlighted client, click **New Client** or **Update Client**. This brings up the **Client Dialog window** where you perform the desired action. You can also double-click a client to update the information for that client. Right-clicking on a client brings up a pop-up menu corresponding with the **New**, **Update** and **Delete** options displayed. You can also click **Delete Client** to remove the client from the system.

While a client is highlighted, the same functions apply to working with cases. Double-click a case or highlight it and click **Update Case** to reveal the **Case Dialog Window**, where you perform the desired action. Clicking **New Case** also reveals the window. Clicking **Delete Case** removes the case from the system.

NOTE: A locator field lets you type a letter which causes the highlighting cursor to jump to the first client name beginning with the letter.

Right side – Documents

The right side of the window displays the documents linked to either the client or the case highlighted on the left side. This is illustrated by Figure 3-14:

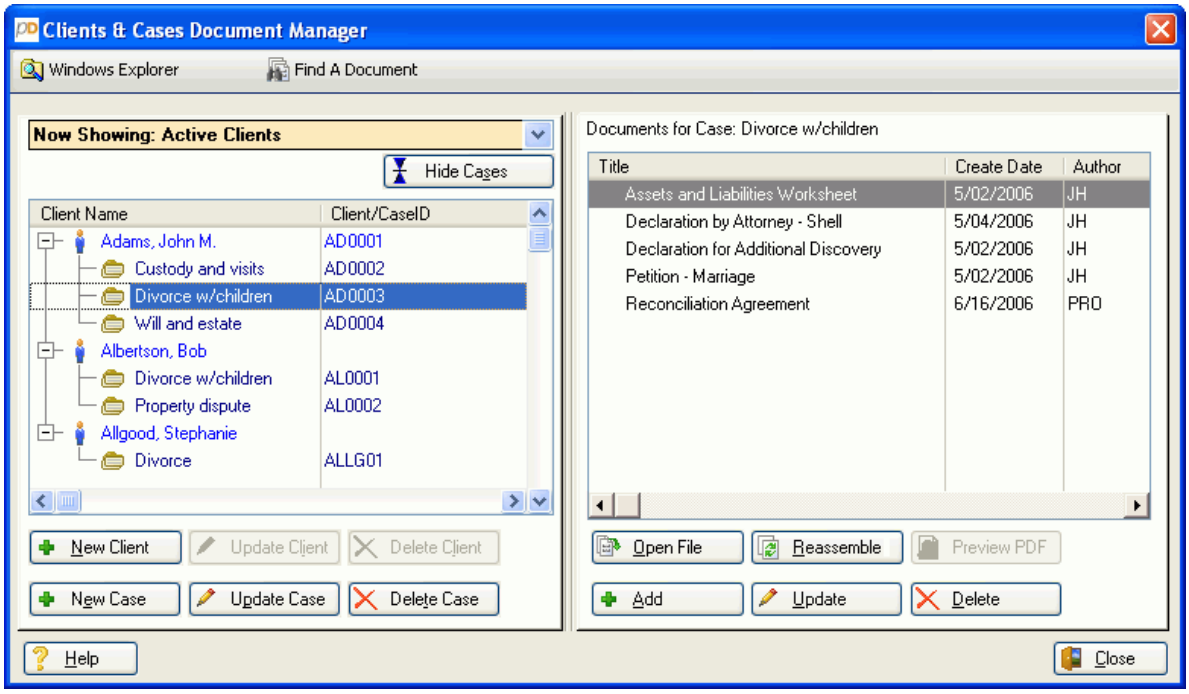


Figure 3-14, Documents Displayed in Document Manager Window

Documents are listed for the highlighted case, sorted alphabetically by title. If desired, you can click the column titles to sort in ascending or descending order by a particular column. Each document's **Create Date** and **Author** are displayed if the window is large enough. You can click and drag the vertical lines to allow more or less room for each column. You can also use vertical or horizontal scrollbars (displayed when needed) to scroll up and down or side to side.

As with clients and cases, you can double-click a document to update it. You can also click a document title to highlight it, then click the buttons to **Add** a document, **Update** the document or **Delete** just the document record or erase the actual document. You can click the **Open File** button to open the document in your word processor. If the highlighted document was assembled in ProDoc, the **Reassemble** button will be active and can be clicked to reassemble the document. You can right-click the document to reveal a pop up window with the same options.

If the document you select is a graphics document, you can view it by clicking the **Preview PDF** button.

Top Section - Find Documents and Forms

One of the ProDoc software's key features is the ability to drag and drop files from computer search windows to your ProDoc database. Two buttons appear in the top section to help you locate documents and forms and either add them to your database or work with them in other ways.

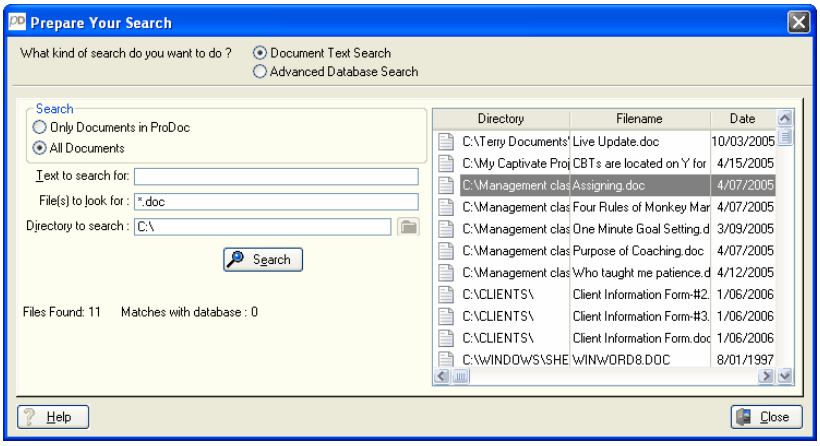
The Windows Explorer functions described below are dependent upon the selections made in **Options and Settings** for **Miscellaneous Firm Settings** 75. Drag and drop results can be set to do the following: physically move selected files to the client/case file folder; only copy files to the client/case folder; or have ProDoc ask you what to do each time you drag and drop.

- **Windows Explorer** - Click this button to open Windows Explorer. You can locate documents and drag them to the right side of the Document Manager window to include them in your ProDoc database. You should resize the explorer window to facilitate selecting one or more file(s) for "dragging" from Explorer over to the right side of the Document Manager window and "dropping" them there. They will then be added to the database for the client or case currently selected.

  NOTE: You can do the same thing using **Windows File Find** or **Search**, and drag the result of your search to the Documents Organizer browse window.

- **Find a Document** - Click this button to search for documents throughout your computer or network folders.

When you click the **Find a Document** button, a window opens similar to Figure 3-15. The Clients & Cases Document Manager stays open also.


Prepare Your Search
What kind of search do you want to do ?
Document Text Search
Advanced Database Search
Search
Only Documents in ProDoc
All Documents
Text to search for:
File(s) to look for : *.doc
Directory to search : C:\
Search
Files Found: 11
Matches with database : 0
Directory
Filename
Date
C:\Terry Documents\ Live Update.doc 10/03/2005
C:\My Captivate Proj CBTs are located on Y for 4/15/2005
C:\Management clas Assigning.doc 4/07/2005
C:\Management clas Four Rules of Monkey Mar 4/07/2005
C:\Management clas One Minute Goal Setting.d 3/09/2005
C:\Management clas Purpose of Coaching.doc 4/07/2005
C:\Management clas Who taught me patience.d 4/12/2005
C:\CLIENTS\ Client Information Form-#2. 1/06/2006
C:\CLIENTS\ Client Information Form-#3. 1/06/2006
C:\CLIENTS\ Client Information Form.doc 1/06/2006
C:\WINDOWS\SHE WINWORD8.DOC 8/01/1997
Help
Close

To facilitate drag and drop, you should resize the window as small as possible and move it as far away as possible from the Document Manager window.

As an example, this search was set up to find any file with a .doc extension. The file Assigning.doc was found.

Figure 3-15, Prepare Your Search Window

You can search any folder, including ProDoc databases, by selecting Document Text Search. Then select your search scope by clicking the button labeled either All Documents or Only Documents in ProDoc.

You can enter matching text in the field labeled **Text to search for:**. Your entry can be up to 512 characters long. ProDoc will search any text document it finds for matching text.

Opposite the field labeled **File(s) to look for**, you can enter classic DOS masks, like ***.doc** to look only for Word documents; **P*** to find any files starting with the letter P, and so on.

Enter your Directory to search by either typing it in or clicking the browse button, , and selecting the directory. Subdirectories will automatically be searched.

Documents matching your criteria will be displayed in the right side of the window. Documents you find outside of ProDoc databases can be dragged and dropped to the Document Manager window to include them in your ProDoc database. Click a file, hold the left mouse button down, and drag the document to the left side of the Document Manager window (to a client or case) or to the right side, then release the button.

Documents and files you add to clients and cases can be opened, edited and saved with their associated program. For example, Word documents will open in Word if you highlight the document and click the **Open** button.

You can correct any drag and drop mistakes by repeating the same operation inside the Document Manager window.

You can also click the button labeled **Advanced Database Search** to search only the ProDoc database with a variety of matching options and criteria. Click the **Help** button when you use this screen to see all available options and controls.

Case Answers - This menu choice brings up a list of all the questions you have answered in a case, which you can quickly edit so that your case documents reflect correct information. This changes only the answers in the ProDoc data files, not in the documents already assembled. To insert the new answers into your documents, you must reassemble the documents.

NOTE: Changing C**ase Answers** is handled differently for those answers that are taken from the **Firm Information** fields (which were entered upon installation). See **Firm Information in Answers** 75 for more information.

PowerPacks Menu

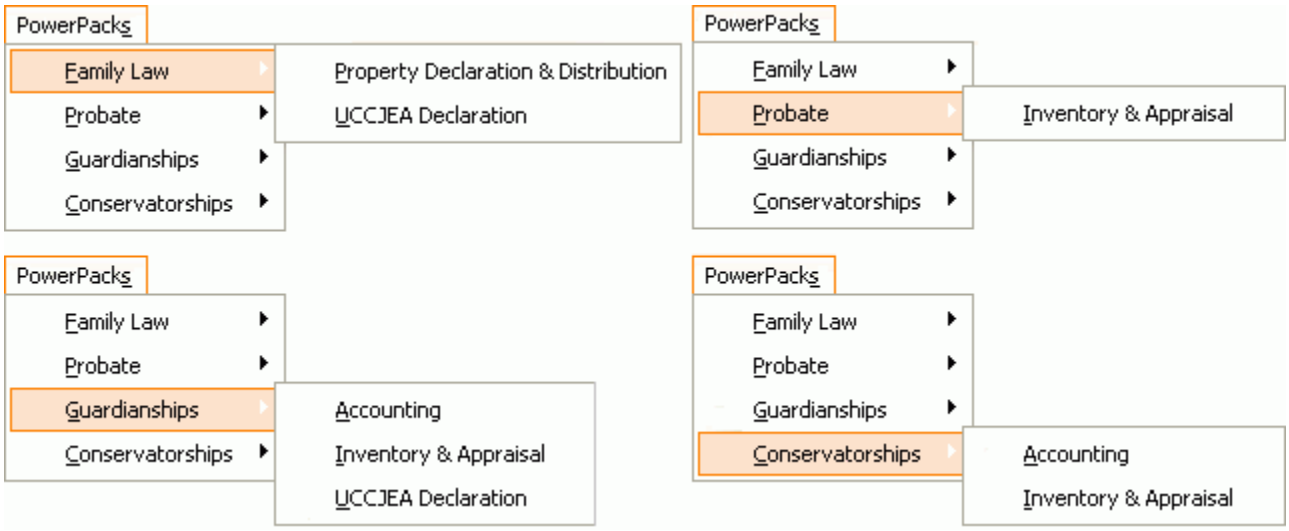


Figure 3-16, California PowerPacks Menu

PowerPacks - In Figure 3-16, the PowerPack name is listed on the left and the programs in the PowerPack are listed on the right side of the menu. This menu will change depending upon which PowerPacks you have installed.

We have developed PowerPacks—Additional Time savers, specific to each state we serve, which are designed to significantly increase your productivity. These programs allow you to enter information in your clients' case files and manage the information quickly and efficiently. If calculations are necessary, the programs perform the calculations and insert the results wherever they are needed.

For more information on the programs available for your state, please visit our Web site at **www.prodoc.com** or call our Sales Department at (800) 759-5418.

Print Menu

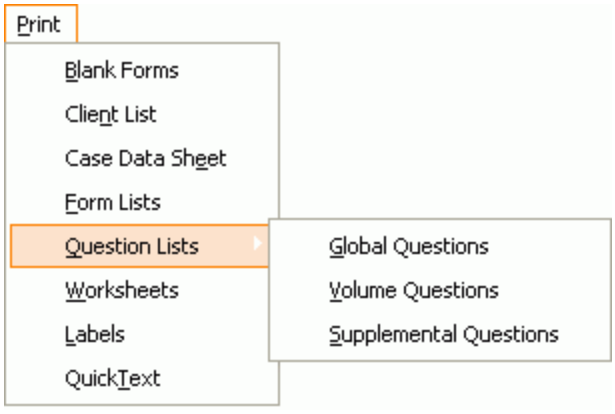


Figure 3-17, Print Drop-Down Menu

This menu item conveniently lists in one place ALL of the print options that are available in ProDoc, including the list of items which follows.

Blank Forms 42 allows you to quickly preview and print any form available in ProDoc so that you can quickly determine if it contains the language you need. Blank forms printed in this manner contain visible coding and formatting that will not appear in your finished ProDoc documents and, accordingly, generally should not be opened for editing directly in your word processor.

Client List 43 prints a list of clients from your database.

- You can select any combination of **Open** or **Closed Clients** and/or **Non-Clients**. Within these categories, you can sort the list by Last Name, Client ID, City, State and Zip Code.
- You can also choose to print open and/or closed cases along with your client listings.

Case Data Sheet 44 prints a summary report for a particular case. You can select the case from active or inactive cases.

Form Lists 44 prints a listing of all master forms in a particular volume:

- **Alphabetical Order** prints a listing of forms in the volume you select in alphabetical order.
- **Menu Order** prints a listing of forms in the volume you select in numerical order by the document selection number.
- **Supplemental** prints a listing of any supplemental forms that you have created and added to a volume.

Question Lists gives you three menu options:

- **Global Questions** 45 prints a list of global questions that apply to all volumes.
- **Volume Questions** 45 prints a list of questions that apply to selected volumes.
- **Supplemental Questions** 45 prints a list of questions specific to any supplemental forms you've added.

Worksheets 46 generates interview questionnaires for clients, reducing the time it takes you to produce documents. There are five different types of worksheets to choose from:

- **Assembly Questions** are those asked during the first phase (assembly or cut-and-paste) of an assembly session.
- **Merge Questions** are asked during the merge phase. Prints all questions that may be asked during the merge phase for the selected document.
- **Custom Merge Questions** creates a "custom" worksheet that contains only those merge questions that would be asked for a specific set of answers to the assembly questions.
- **All Questions** prints a list of all questions asked for the selected form(s).
- **All Questions as Asked** prints a list of all questions for the form(s) in the order asked.

Labels 47 displays the setup window for printing labels for all or selected clients. You may choose from a number of commonly available templates. You can also control which labels on a page are printed by selecting how many labels to skip.

QuickText 47 gives you a convenient way to view and/or print a summary report of all established QuickText entries along with their assigned hot keys.

Print Blank Forms Menu

The **Print Blank Forms** menu choice lets you to print a document that has blank spaces in the place of fill-in-the-blank answers. You can see what the completed document will look like before you print it. Many attorneys use this feature so they can fill in the information on paper instead of directly entering the information into a computer while the client is in the office.

This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

1. From the **Main Menu,** click **Print → Blank Forms**.
2. Click **Select Form**.
3. Select a volume with the drop down arrow at the top of the window. A list of forms appears.
4. Select a subvolume if desired. Set the list order with the **Numerical** or **Alphabetical** tabs.
5. Double-click the form you want. If it's not visible, you can scroll down or use the **Find** button to search for a form by entering search words. Clicking the **Info** button opens a window with specific form information.
   a. If you select a graphic form, the form will always be printed blank and no questions will be asked. The remaining steps here will not apply. Simply click the **Print** button to send the form to your printer.
   b. If you select a non-graphic form, see steps 6-10 below.
6. Select **Assembled** or **Not Assembled**.
7. For **Assembled**, you'll be given assembly questions to answer. Fill-in-the-blank underlines "___" will be inserted in the document. For **Not Assembled**, no questions will be asked and the form will appear with programming codes and selection choices.
8. Click **Print**. If you chose **Assembled**, a series of questions will appear.
9. You can type in answers or insert **QuickText** entries, and you can also designate the answer as a **Default Answer** for the question. Click **Next** or **Previous** to move between questions. An explanation of the question can be toggled on and off by the **Show/Hide Explanation** tab. After you answer the questions, the form will be displayed in a window.
10. You can send the form to your printer, open it in your word processor to view how it will look when printed, or close it by clicking the displayed buttons.

Print Client Lists Menu

The **Print Client list** menu choice prints a list of all clients in the database. This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

- You can select any combination of **Open** or **Closed Clients** and/or **Non-Clients**. Within these categories, you can sort the list by Last Name, Client ID, City, State and Zip Code.
- You can also choose to print open and/or closed cases along with your client listings.

To print a client list:

1. From the **Main Menu**, click **Print → Client List**.
2. Use the drop down arrow next to **Sort Clients by:** to choose a sort order for your list.
3. Click the boxes to select any combination of **Open, Closed** or **Non-Clients**.
4. Along with these entries, you can print cases. Select the appropriate check boxes to do this.
5. Select **Print Preview** if you want to see the results on the screen before printing.
6. Click **Print**. A window for your default printer will appear.
7. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print Case Data Sheet Menu

The **Print Case Data Sheet** menu choice prints a summary report for a particular case. This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

1. From the **Main Menu**, click **Print → Case Data Sheet**. Click the **Select Case** button on the **Case Data Sheet Report** window.
2. If the case you want isn't shown, use the **"Now Showing"** drop down arrow to choose a type of contact/client: **All Contacts, Active Clients, Closed Contacts, Private Clients or Non-Clients.** You can also click the **Show/Hide Cases** button to perform each operation. Finally, you can use the scroll bar.
3. Select a case. Note that you can also add, update or delete cases. You can also reveal more detailed client information by clicking on the arrow button on the right border.
4. Select **Print Preview** if you want to see the results on the screen before printing.
5. Click **Print**. A window for your default printer will appear.
6. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print Form Lists Menu

The **Print Form lists** menu choice prints all master forms in a particular volume. This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

- **Alphabetical Order** prints a listing of forms in the volume you select in alphabetical order.
- **Menu Order** prints a listing of forms in the volume you select in numerical order by the document selection number.
- **Supplemental** prints a listing of any supplemental forms that you have created and added to a volume.

To print a form list:

1. From the **Main Menu**, click **Print → Form Lists**.
2. Use the drop down arrow to choose a sort order for your list: **Alphabetical Order, Menu Order** (in the order forms appear on a volume list), or **Supplemental** (will print only supplemental forms you've added to a volume).
3. Click **Select Volume**. Choose a volume from the list. Click **OK**.
4. Select **Print Preview** if you want to see the results on the screen before printing.
5. Click **Print**. A window for your default printer will appear.
6. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print Global Questions Menu

This menu choice allows you to print a list of questions that apply to all volumes. You can print either **Merge Questions** or **Assemble Questions**.

- **Merge Questions** ask for information such as names, addresses and dates for a specific case document.
- **Assemble Questions** are used by ProDoc to determine how to cut and paste clauses/paragraphs in a master form to create a customized document for your specific case.

Use the following steps to print **Global Questions**:

1. From the **Main Menu**, click **Print → Question Lists → Global Questions**.
2. Choose either **Merge** or **Assemble Questions** by clicking the button next to your choice.
3. The **Print Preview** box is selected by default. If you do not want to preview the print job before printing, click the box to deselect the option.
4. Click **Print**. The Report Destination window appears.
5. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print Volume Questions Menu

This menu choice allows you to print a list of questions that apply to a single volume. You can print either **Merge Questions** or **Assemble Questions**.

- **Merge Questions** ask for information such as names, addresses and dates.
- **Assemble Questions** help ProDoc determine how to cut and paste clauses/paragraphs in a master form to create a customized document for your specific case.

Use the following steps to print **Volume Questions**:

1. From the **Main Menu**, click **Print → Question Lists → Volume Questions**.
2. Choose a Volume by clicking the **Select Volume** button and selecting the appropriate volume from the **Volume Selection Window**.
3. Choose either **Merge** or **Assemble Questions** by clicking the button next to your choice.
4. The **Print Preview** box is selected by default. If you do not want to preview the print job before printing, click the box to deselect the option.
5. Click **Print**. The Report Destination window appears.
6. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print Supplemental Questions Menu

This menu choice allows you to print a list of supplemental questions that you've added to your ProDoc installation to tailor it to your needs. Use the following steps to print **Supplemental Questions**:

1. From the **Main Menu**, click **Print → Question Lists → Supplemental Questions**.
2. Choose a Volume by clicking the **Select Volume** button and selecting the appropriate volume

from the **Volume Selection Window**.

3. The **Print Preview** box is selected by default. If you do not want to preview the print job before printing, click the box to deselect the option.
4. Click **Print**. The Report Destination window appears.
5. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print Worksheets Menu

The **Print Worksheets** menu choice generates interview questionnaires for clients, reducing the time it takes you to produce documents. This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

There are five different types of worksheets to choose from:

- **Assembly Questions** are those asked during the first phase (assembly or cut-and-paste) of an assembly session.
- **Merge Questions** are asked during the merge phase of document assembly. This prints all questions that may be asked during the merge phase.
- **Custom Merge Questions** creates a "custom" worksheet that contains only those merge questions that would be asked for a specific set of answers to the assembly questions. For instance, using this option for a divorce petition would cause ProDoc to ask how many children there are. If you answer zero, then the worksheet will not include questions that pertain only to couples with children. This option lets you use the answers you previously entered for a case as default answers to the assembly questions and to include the assembly questions and answers in the worksheet.
- **All Questions** prints a list of all questions asked for the selected form(s).
- **All Questions as Asked** prints a list of all questions for the form(s) in the order asked

Perform the following steps to print worksheets:

1. From the **Main Menu**, click **Print** → **Worksheets**.
2. Choose a report type by clicking the button next to the desired type.
3. Click the **Select Forms** button. Basic functions of the window that appears are described below.
   a. You can find and select one or multiple forms from the volume you select.
      i. You can choose from the sub-volumes on the left; the default is **All**.
      ii. You can also display the list in **Numerical** or **Alphabetical** order by selecting the tabs.
      iii. Once you've added **Supplemental forms** to a volume you select, you can find these by selecting the **Supplemental** tab.
      iv. Use the **Form Sets** tab to add the forms from any special sets you have created to the list of forms to print. If you have not yet set up any special sets, you can do so by clicking the **Set up form sets** button.
      v. Click the **Selections** tab to display only the forms you have selected.
   b. Click the box next to the forms you want. You can research the forms further:
      i. Click the form title to select the form;

ii. Click **Form Info** to see discussion about the highlighted form and/or **View** to see the form.

c. You can click **Find** to search for a form by a word or phrase in either the form and title or only in the title. You can flip through instances using the **Find Previous** or **Find Next** buttons.

4. Select the form(s) for which you want a worksheet. If you chose **Custom Merge Questions,** you may click the **Select Case** button to select a specific case before proceeding. This is not required. However, if you select a case, you can save the answers you provide in the case file.
5. If desired, click the box labeled **Show Question Token Numbers**. These numbers are assigned by ProDoc to identify the questions and control certain other variables. If the box is selected, these questions will be displayed in your report.
6. If you chose **Custom Merge Questions**, the **Show Assembly Questions** selection box is displayed. You may click this box to print the questions that will be asked during assembly of the form.
7. Click **Print**. If you are producing a report of **Custom Merge Questions**, you will be prompted to answer questions before printing. When you are finished, the Report Destination window appears.
8. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print Labels Menu

The **Print Labels** menu choice displays the setup window for printing mailing labels for all contacts or for only those contacts you select. This section covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

1. Choose a template by clicking on the drop-down arrow field next to **Label:**. Several common label definitions are included here, and you can also design your own. See the **Tools Menu** 75 to do this.
2. If desired, select the **Skip Labels** box to skip a set number of labels. Select the number by clicking the spin arrows in the **How many to skip:** field.
3. By default, the **All Contacts** button is selected. If you want to select specific clients, click the **All Contacts** button to cancel the selection.
4. Select specific contacts by clicking the **Select Contacts** button.
5. Click the **Select Contacts** button. Choose contacts from the resulting window.
6. The **Print Preview** box is selected by default. If you do not want to preview the print job before printing, click the box to cancel the selection.
7. Ensure you have loaded the appropriate label forms in your printer. Click the **Print** button.

If you chose print preview, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print QuickText Menu

The **Print QuickText** menu choice lets you print a list of QuickText entries you've created.

1. From the **Main Menu**, click **Print** → **QuickText**.

2. Select or unselect **Print Preview** by clicking in the box. Either way, the print window for your default printer appears. Click **OK** to print or to preview the list before printing, depending on your **Print Preview** choice.
3. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

Print Preview Window Menu

If you selected Print Preview while printing a report, a window similar to Figure 3-18 appears. See the captions on the window for descriptions of icon/arrow functions. You can search, flip through pages, select pages to print and more.

When you're finished previewing, click the icon to print only the current page, or click the icon to print all pages or the page range you've designated.

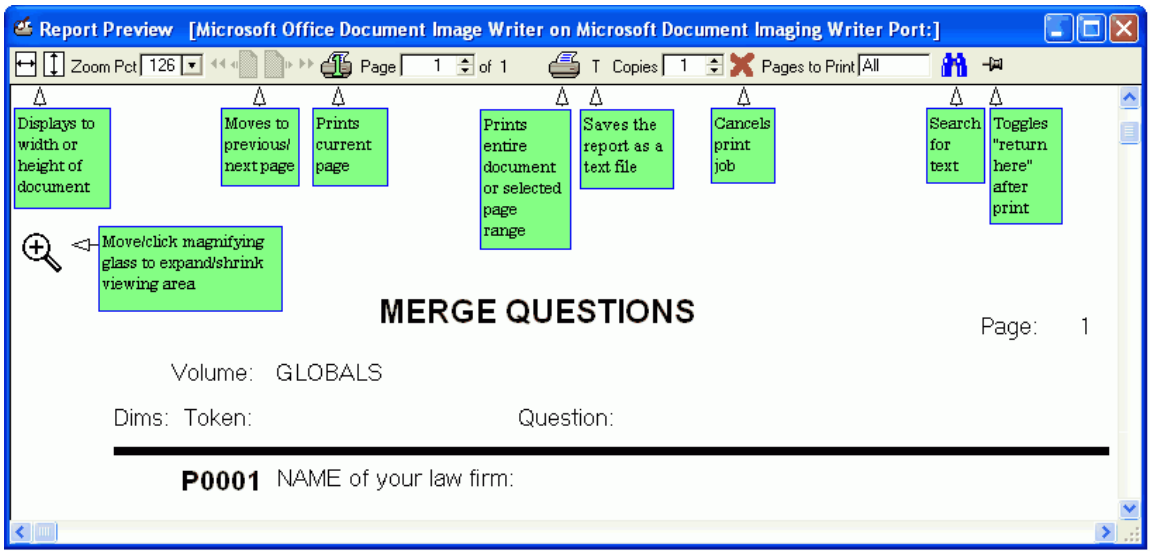

Report Preview [Microsoft Office Document Image Writer on Microsoft Document Imaging Writer Port:]
Zoom Pct 126
Page 1 of 1
Copies 1
Pages to Print All
Displays to width or height of document
Moves to previous/ next page
Prints current page
Prints entire document or selected page range
Saves the report as a text file
Cancels print job
Search for text
Toggles "return here" after print
Move/click magnifying glass to expand/shrink viewing area
MERGE QUESTIONS
Page: 1
Volume: GLOBALS
Dims: Token:
Question:
P0001 NAME of your law firm:

Figure 3-18, Print Preview Screen Functions

Customize Menu

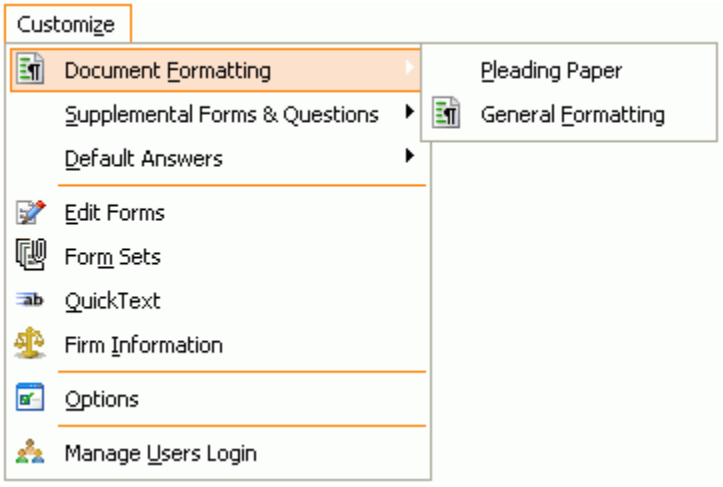


Figure 3-19, Customize Menu

This menu item brings up a list of settings and information used throughout ProDoc.

NOTE: You must have Supervisor login privilege to access the **Manage Users Login.**

Document Formatting 50 leads you to two sections:

- **Pleading Paper** lets you modify the print format to use for pleadings. By default, all pleadings you produce will be formatted according to California court requirements, with line numbers, page numbers and a document title footer.
- General Formatting 52 lets you set default formatting options for word processing documents and forms.

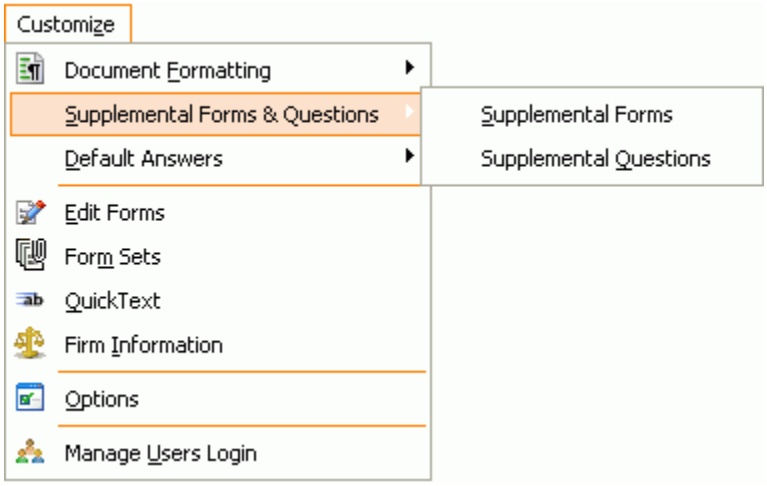


Figure 3-20, Supplemental Forms & Questions Menu

Supplemental Forms and Questions 55 leads you to two sections:

- **Supplemental Forms** allows you to access any forms that you've created and added to ProDoc software's thousands of professionally developed master forms. See Appendix D 294 of the software manual for help on creating your own forms.
- **Supplemental Questions** lists supplemental questions you've added to your ProDoc installation to tailor it to your needs. You can also add, change or delete supplemental questions here.

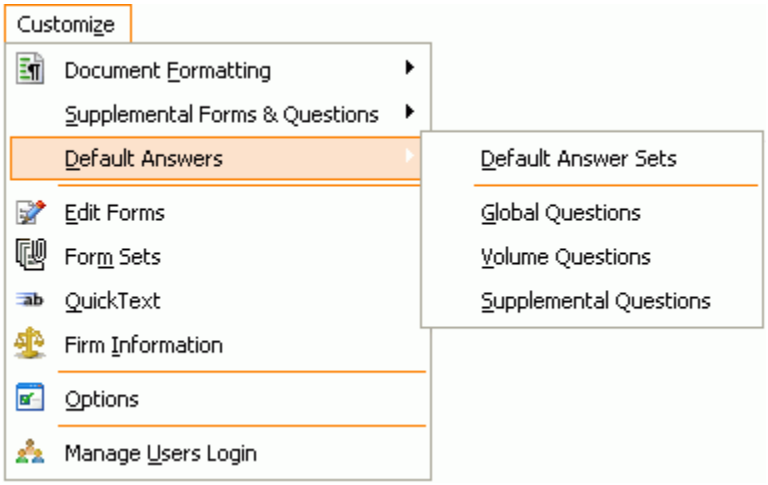


Figure 3-21, Default Answers Menu

Default Answers 57 allows you to specify what information is automatically entered when questions are asked by the program. This feature is categorized by global questions, questions for each volume, and supplemental questions. You can also use this menu item to import another user's default answers. This is useful in many situations that arise when different users must work on the same computer.

Edit Forms 60 allows you to edit the master forms (or form templates) used in ProDoc. Use this option to open a forms management window where you can search for forms or select a volume to find the form (s) that you wish to edit. For detailed information on editing forms, see **Appendix B** 271 and **Appendix D** 294.

Form Sets 60 allows you to designate groups of forms and retrieve them by the set name. For instance, if you've identified three forms that you complete for every adoption case, you can group those forms here and label them appropriately.

QuickText 61 lets you save text (e.g., courthouse addresses, favorite clauses) that you may wish to easily recall and re-use in any case, and assign hot keys to these text entries. This helps you avoid retyping repetitive phrases.

(If available)

Firm Information 62 lets you enter or edit relevant firm information **(except your Firm Name, which is entered during registration)** so you can avoid entering it on each document, form or report.

Options 63 brings up the **Options and Settings** window. You can specify settings and set defaults here for forms, document assembly options, client and case IDs and custom fields, choice of word processor, file name styles and locations, graphic form settings, startup options and backup settings. You can also specify how ProDoc interacts with your word processor and with the Small Office Suite and Timeslips (if these are installed).

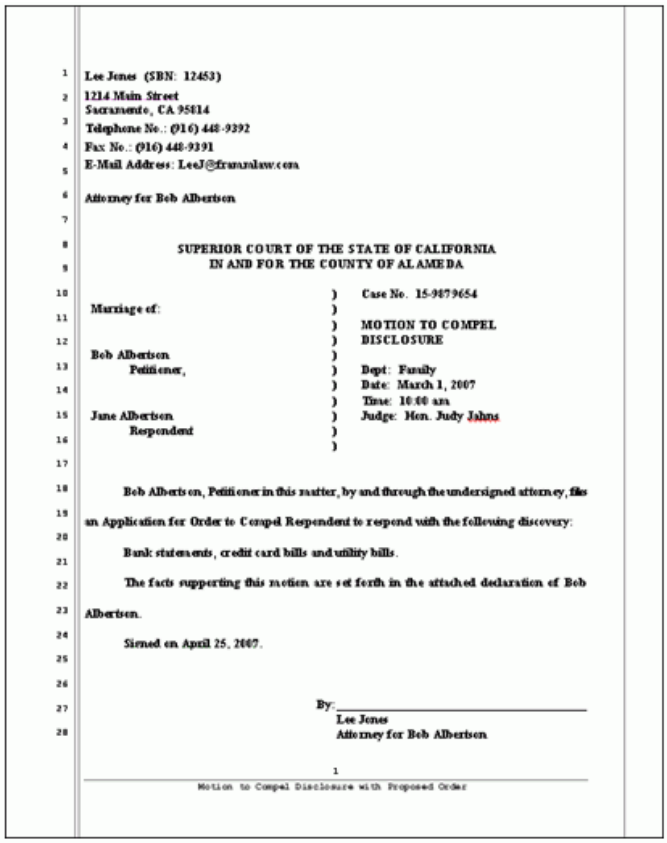
Manage Users Login 13 is only available to designated Supervisors. This choice is not displayed in the graphic figures in this manual. This choice opens the **Browse Users Records** window, which Supervisors can use to manage various user settings.

Document Formatting Menu

This menu allows you to change the formatting properties of **word processing** documents. These settings do **not** apply to **graphic forms** 67.

While ProDoc has an excellent default format for documents, you can set specific formatting properties if desired. You can change formatting for pleadings, all documents (Global Settings), all documents in a Volume, or individual documents. This feature gives you control over how your finished documents appear when printed. When you select **Document Formatting** from the menu, a submenu appears with two choices: **Pleading Paper** and **General Formatting.**

The first selection, **Pleading Paper,** lets you make formatting choices for pleadings. When you assemble a pleading without making any formatting changes, it automatically includes the formatting features required for these documents in California.



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Attorney for Bob Albertsen

SUPERIOR COURT OF THE STATE OF CALIFORNIA
IN AND FOR THE COUNTY OF ALAMEDA

Marriage of:
Bob Albertsen
Petitioner,
Jane Albertsen
Respondent

Case No. 15-9879654
MOTION TO COMPEL DISCLOSURE
Dept: Family
Date: March 1, 2007
Time: 10:00 am
Judge: Hon. Judy Johns

Bob Albertsen, Petitioner in this matter, by and through the undersigned attorney, files an Application for Order to Compel Respondent to respond with the following discovery:

Bank statements, credit card bills and utility bills.

The facts supporting this motion are set forth in the attached declaration of Bob Albertsen.

Signed on April 25, 2007.

By: _____
Lee Jones
Attorney for Bob Albertsen

1
Motion to Compel Disclosure with Proposed Order

Figure 3-21A, Printed Document View

Figure 3-21A illustrates a pleading document printed with the default settings for **Pleading Paper** options. These settings include California's required formatting features on any pleadings you produce.

Using the **Pleading Paper** menu choice, you can turn off all formatting by clearing the check in the **Let ProDoc Generate Pleading Paper** box on the **Pleading Paper Options** window. You can also uncheck the box to exclude either of the following formatting features: **(1) Line numbers and vertical lines at left and right margins,** or **(2) Document name and page number at bottom of page.**

Please note that when either or both of the options above are enabled, pleading documents you assemble will **not** contain formatting changes you have made to **margins** through the **General Formatting** menu. All other formatting changes will be reflected in your completed document.

To change the default settings, click **Customize → Document Formatting → Pleading Paper.**

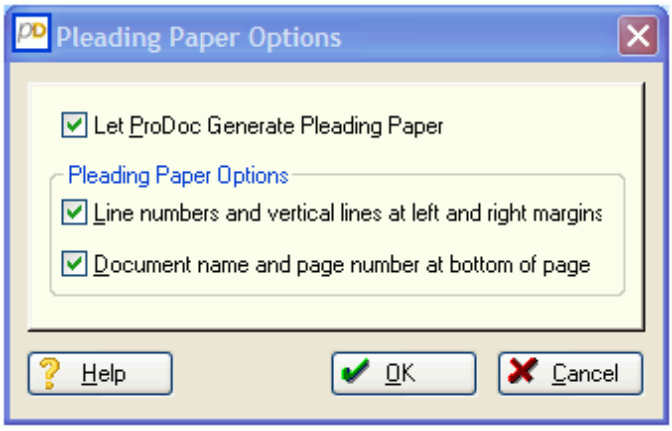

Pleading Paper Options
Let ProDoc Generate Pleading Paper
Pleading Paper Options
Line numbers and vertical lines at left and right margins
Document name and page number at bottom of page
Help
OK
Cancel

Figure 3-21B, Pleading Options Window

If you don't want to use any pleading paper formatting, uncheck the box titled **Let ProDoc Generate Pleading Paper.** For **pleading forms only,** this action will also activate changes made to the margins of these forms through the **Default Formatting** window.

If you want to use only one of the two formatting options, check or uncheck the appropriate **Pleading Paper Options** box to include or exclude an option. Note that these options are only available when the **Let ProDoc Generate Pleading Paper** box is checked.

The second menu choice, **General Formatting,** lets you set default formatting options for documents and forms. Options range from global to volume to specific form settings for fonts, spacing, margins and paragraph styles.

Default Formatting for Pleading Documents. ProDoc generates required pleading paper formatting by default. This formatting require pre-set margins. Therefore, formatting changes that you make to **margins** through this window will **NOT** be applied to printed pleading documents until you **disable** pleading paper formatting. Click **here** 51 or scroll up to see the procedures for disabling this default setting. Font, line spacing and justification changes **are** included in completed pleading documents. Pleadings are the **only** word processing documents with these restrictions on margin formatting changes.

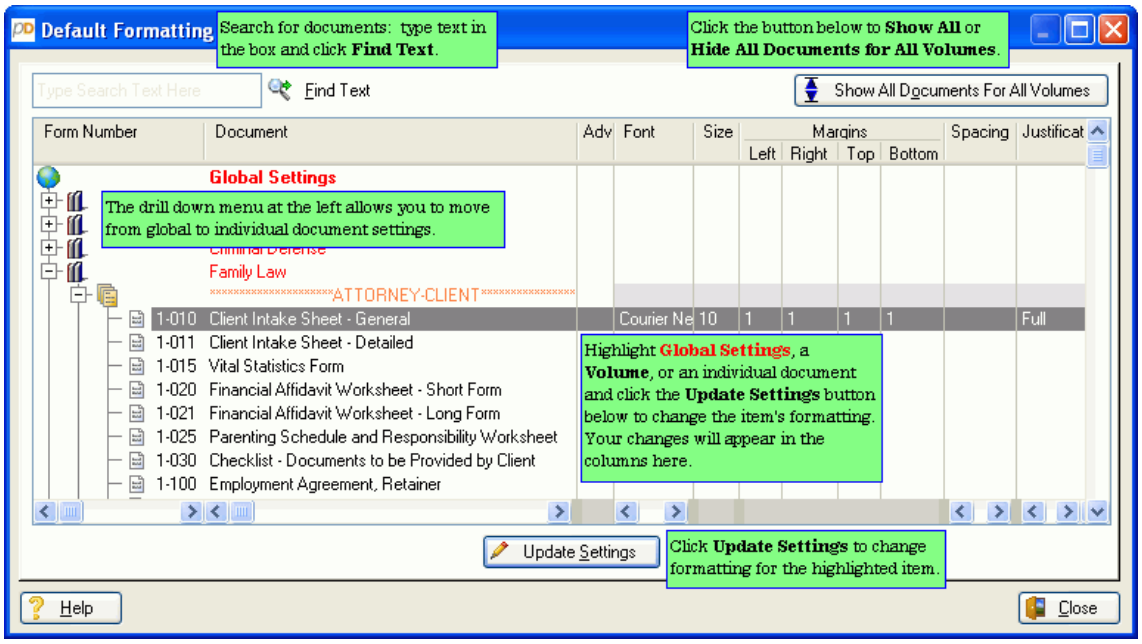

Default Formatting
Search for documents: type text in the box and click Find Text.
Click the button below to Show All or Hide All Documents for All Volumes.
Type Search Text Here
Find Text
Show All Documents For All Volumes
Form Number
Document
Adv
Font
Size
Margins
Left
Right
Top
Bottom
Spacing
Justificat
Global Settings
The drill down menu at the left allows you to move from global to individual document settings.
Family Law
ATTORNEY-CLIENT
1-010 Client Intake Sheet - General
Courier Ne 10 1 1 1 1 Full
1-011 Client Intake Sheet - Detailed
1-015 Vital Statistics Form
1-020 Financial Affidavit Worksheet - Short Form
1-021 Financial Affidavit Worksheet - Long Form
1-025 Parenting Schedule and Responsibility Worksheet
1-030 Checklist - Documents to be Provided by Client
1-100 Employment Agreement, Retainer
Highlight Global Settings, a Volume, or an individual document and click the Update Settings button below to change the item's formatting. Your changes will appear in the columns here.
Update Settings
Click Update Settings to change formatting for the highlighted item.
Help
Close

Figure 3-22, Default Formatting Window

When you choose **General Formatting,** the **Default Formatting** window appears. The window opens with **Global Settings** highlighted. In the navigation tree, this is designated with the Globe icon. To change formatting for all documents in all volumes, click the **Update Settings** button at the lower right corner of the window. If you navigate elsewhere on this window and then decide to change global settings, click anywhere on the **Global Settings** line to highlight it, then click **Update Settings.**

To change settings for all documents in a **Volume** (designated with the icon) or for an individual document (designated with the icon), you can click the desired volume or document, then click the **Update Settings** button. You will not be able to update settings by chapters (icon); these only group related forms. There are several methods for finding the volume or document that you want:

- Type a word or phrase into the box at the bottom left corner of the window and click the **Find Text** button. The search process will find instances of the text in volume and document titles and open the navigation tree to reveal a match. Click the **Find Text** button again to reveal the next match if needed. Click **Update Settings** when the item you want is highlighted.
- Use the **Show/Hide all Documents** button to either display or hide all documents. Selecting "Show" will take some time; it fully expands the navigation tree on the left side of the window. Hiding all documents makes it easier to scroll to volumes. Use the scroll bar at the right of the window to scroll to the item you want, click it, and then click **Update Settings**.
- Use the left side tree to drill down to a volume or document. Click ⊞ to expand a category and ⊟ to shrink the category header. Click the item you want, then click **Update Settings**.

After you click **Update Settings**, the Document Formatting Options window appears, similar to Figure 3-23. This window has two tabs - **Standard** and **Advanced.**

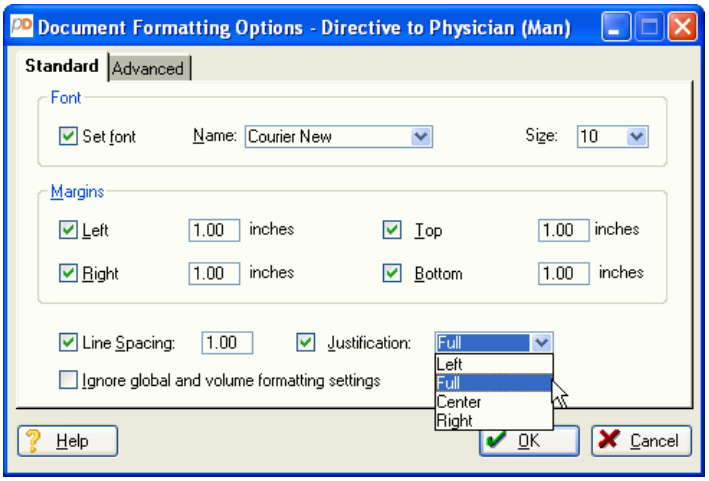


Figure 3-23, Document Formatting Options, Standard

The **Standard** tab is selected by default. It allows you to set default standard formatting options: font type and size, margins, line spacing and text justification. Click in each box and/or use drop down arrows to change settings. The formatting options work almost exactly the same as those in popular word processing programs, with an important exception: the **Ignore global and volume formatting settings.** If you check this box, the document will be produced with the exact settings shown in the window and global/volume configuration files will be ignored. If you don't check it and leave some features unchanged, global and volume settings will be used for the unchanged features.

Document Formatting Window Terms Explained

Font – The particular style of type used in your document.

Name - Name of the font for use. This includes the most popular proportional serif (Times New Roman and Roman) and sans serif (Arial) fonts. The default font is Times New Roman, unless an agency form requires a different font.

Font Size - Size of the font in points. One point is 1/72nd of an inch, so 12 point type would be 1/6th inch high. Standard sizes for most correspondence is 10 point or 12 point type.

Margins - Margin size in fractions of an inch. Margins of one-half inch would be entered as 0.50 while margins of one inch would be entered as 1.00. You can specify settings for **Left**, **Right**, **Top**, and **Bottom** margins.

Line Spacing - Spacing between lines. Normal type is single-spaced, and you can enter whole numbers and fractions. For single spacing enter 1.00, and for double spacing enter 2.00.

Justification - **Left-justified** text has a smooth left edge and ragged right edge, while **full-justified** text has smooth right and left edges with variable spacing between words. **Right-justified** text results in a smooth right edge with variable spacing between words. **Center** is rarely used in documents since both sides are uneven. You can specify settings for **Left**, **Full**, **Center**, and **Right** justification. Using full justification with mono-spaced type (Courier New) may result in excessive spacing between letters. If you use full justification, you should also use a proportional font, such as Times New Roman.

Ignore Formatting Settings - The Volume Formatting Options window contains an **Ignore global formatting settings** check box. If it is checked, the value set in the form is used for any formatting item that is unchecked in the Volume Formatting Options window instead of the value set in the

Global Formatting Options window. The Specific Documents Formatting Options window also contains an **Ignore global and volume formatting settings** check box. If it is checked, the value in the form is used for any formatting item that is unchecked in the Specific Document Formatting Options window instead of the value set in either the Global or Volume Formatting Options windows.

How does ProDoc Prioritize Formatting?

Global, Volume and Specific Document formatting values can all apply to a particular document. Here's how ProDoc determines which to use:

1. If there is a Specific Document value for the particular setting, ProDoc uses it.
2. Otherwise, if there's a Volume value for the setting and "Ignore global and volume formatting settings" was not checked in the Specific Document Formatting Options window for the document, ProDoc uses the Volume value.
3. Otherwise, if there is a Global value for the item and "Ignore global and volume formatting settings" was not checked in the Specific Document window for the document, and "Ignore global settings" was not checked in the Volume Formatting Options window for the volume containing the document, ProDoc uses the Global value.
4. Otherwise, ProDoc uses the value in the ProDoc form.

NOTE: The sources for formatting item values are determined item by item. A document might be assembled using a Specific Document line spacing value, a Volume left margin value, a Global justification value and the font in the ProDoc form. **Formatting option settings apply only to the user who created them.** To make the formatting option settings of one user available to another user, you must copy the files that contain the settings. Global formatting option values are stored in a file called XXXGCFG.INI in the ProDoc home directory where "XXX" is the initials of the user who created the settings. The volume and specific document settings are stored in files called XXXCFG.INI in the volume subdirectories. To make the settings available to user YYY, copy XXXGCFG.INI to YYYGCFG.INI and each of the XXXCFG.INI files to YYYCFG.INI. This will overwrite any formatting option settings that user YYY might have had.

Click the **Advanced** tab to create a configuration file for such things as headers and footers, page numbers, fonts, and the like.

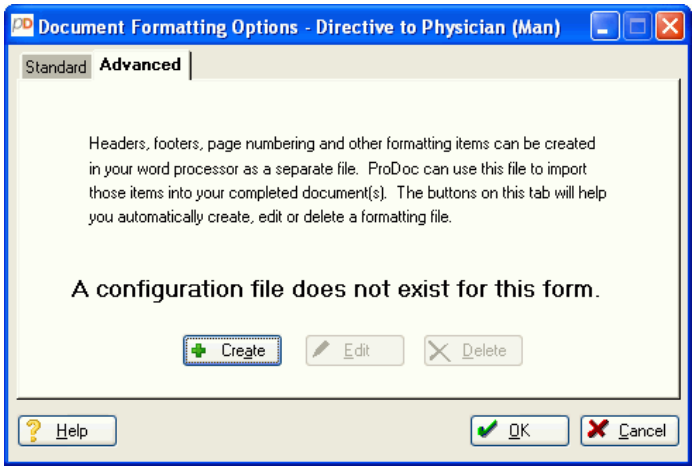

Document Formatting Options - Directive to Physician (Man)
Standard
Advanced
Headers, footers, page numbering and other formatting items can be created in your word processor as a separate file. ProDoc can use this file to import those items into your completed document(s). The buttons on this tab will help you automatically create, edit or delete a formatting file.
A configuration file does not exist for this form.
Create
Edit
Delete
Help
OK
Cancel

Figure 3-24, Document Formatting Options, Advanced

You can click **Create** to open your word processing program and create an advanced configuration file. If you've already created an advanced configuration file, **Edit** enables you to open your word processor and make changes to it. **Delete** lets you delete it.

You can refer to your particular word processor's documentation to determine how to create a file containing headers, footers, etc. When a document is assembled, ProDoc checks for the presence or absence of configuration files, and if one or more configuration files that apply to the document exist, ProDoc inserts the highest priority configuration file into the document. *Note: If the configuration file sets the value of one of the Formatting Options items, e.g. left margin, the value set in the formatting window takes precedence and will override the value in the configuration file.*

Configuration Files

There are three types of configuration files:

- The global configuration file applies to all documents and has the lowest priority. It is stored as GLOBAL.CIF in the ProDoc home directory.
- A volume configuration file applies to all documents in one volume. Each is stored as VOLUME.CIF in the subdirectory of the volume to which applies.
- A specific document configuration file applies to a single document. Each is stored as DOCNAME.CIF, where "DOCNAME" is the filename of the form from which the document is generated, in the subdirectory of the volume containing the form.

To create a global configuration file, click the **Create** button. If your word processor is not running, a dialog box will ask you whether you want to start it. Click **Yes** to start your word processor. Once your word processor is running, add the formatting features you want. The procedure will differ depending on which word processor you use.

Headers, footers and normal text items can be added. You can also insert such things as symbols, the date and/or time, and page numbers. Follow your word processor's guidance on creating or inserting items other than normal text. You may also insert ProDoc codes as text, such as ~P0001G, which during document assembly causes ProDoc to ask the user to enter the name of the law firm and then replace all occurrences of ~P0001G with that answer.

Many customers choose to have the name of the document and the case style show up in their headers or footers. To do this, insert the code ~I9100G into headers and footers. The code for the Petitioner's name is ~M1200G and the Respondent is ~M1300G. To set up the header or footer to show the case style, you should enter **~M1200G v. ~M1300G.**

After you have entered your desired contents, select **File/Save.** The **Save File** window will appear. The correct filename is GLOBAL.CIF for a global configuration file, VOLUME.CIF for a volume configuration file, and DOCNAME.CIF where "DOCNAME" is the name of the form to which the configuration file applies.

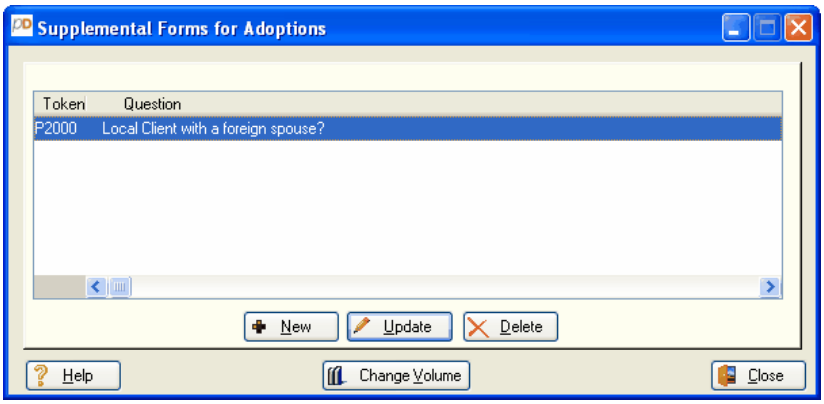
Save Global Configuration files to the ProDoc home directory. Save a Volume or Specific Document configuration file in the volume's subdirectory. You should save the file as a WordPerfect 5.X file and ***surround the file name with quotation marks*** *(e.g. "GLOBAL.CIF")* in order to avoid having your word processor append its unique file extension. Some Word users may only be able to save the document as a Word Document. After saving the file, exit your word processor and return to ProDoc. Subsequently assembled documents to which the configuration file applies will contain your additions or changes.

Supplemental Forms and Questions Menu

Supplemental Forms allows you to access any forms that you've created and added to ProDoc software's thousands of professionally developed master forms. See **Appendix D** 294 of the software manual for help on creating your own forms.

Supplemental Questions lists supplemental questions you've added to your ProDoc installation to tailor it to your needs. You can also add, change or delete supplemental questions here. Clicking this choice brings up the Volume Selection window. Choose a volume that holds supplemental questions you've created, or one to which you want to add supplemental questions, and click **OK**. A window

appears, similar to Figure 3-25. Either a list of supplemental questions you've created for the volume is shown, or the window will be blank if you are adding questions to a particular volume for the first time.



To add a new question, click **New**. To update or delete a question, click the question and click the appropriate button.

You can click the **Change Volume** button at the bottom of the window to view supplemental questions in a different volume, or add them to the volume.

Figure 3-25, Browse Supplemental Questions

When you click the **New** or **Update** buttons, a window appears similar to Figure 3-26.

Use this dialog window to add or change supplemental questions, their tokens and size parameters.

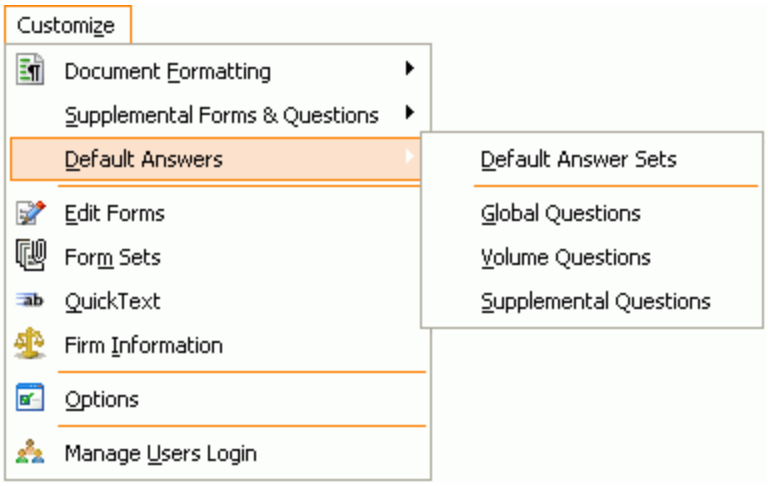
Figure 3-26, Update Supplemental Questions

You need to complete four fields for a new question:

- **Tokens** must only start with a P, followed by 4 alphanumeric characters, i.e. "P00A1." Special characters are not allowed.
- **Question** is the text of the question you want the user to see.
- **Rows** is the number of rows (lines) you want to make available to the user to enter an answer.
- **Columns** is the number of columns you want to give the user to answer the question. The maximum number of columns allowed is 65. The number of characters that can be entered to answer the question is generally determined by multiplying Rows by Columns.

  After you have entered all the appropriate information, click the **OK** button. Your new supplemental question will now appear in the window.

Default Answers Menu



Default Answers menu choices in Figure 3-27 allow you to specify the answers displayed when questions are asked by the program. This includes answers for global questions, questions for each volume, and supplemental questions. You can also use this menu to import another user's default answers. This is useful when different users must work on the same computer or support multiple attorneys.

Figure 3-27, Default Answer Sets

Default Answers are answers that automatically appear as the proposed answer when a question is first asked. If the default answer which appears is the correct answer, then you do not have to type or select the answer. You just accept the default answer and continue on to the next question. If not, simply make a different selection or type in the answer you want.

Many questions will often have the same answer, such as the attorney's name and bar number. You can save a tremendous amount of time and effort by setting default answers, and ProDoc makes the process of setting answers extremely easy.

NOTE: The procedures in this section do **not** apply to setting default answers for **Firm Information** fields, such as firm's name, address, phone/fax, email address and Web site. Click the **Firm Information in Answers** 75 link to see how to set default answers for these items.

You can scroll through the questions in a volume and set default answers for any of the questions. From the **Main Menu**, click **Customize** → **Default Answers**. This brings up the Default Answers drop down menu where you can select Global, Volume or Supplemental Questions. Global questions apply to all volumes, Volume questions apply to a specific volume (such as Family Law), and Supplemental questions are questions which you have added to a volume. For example, selecting Global Questions brings up a Set Default Answers window like the one shown in Figure 3-28. Setting default answers for Volume and Supplemental questions (if any) is done in the same manner.

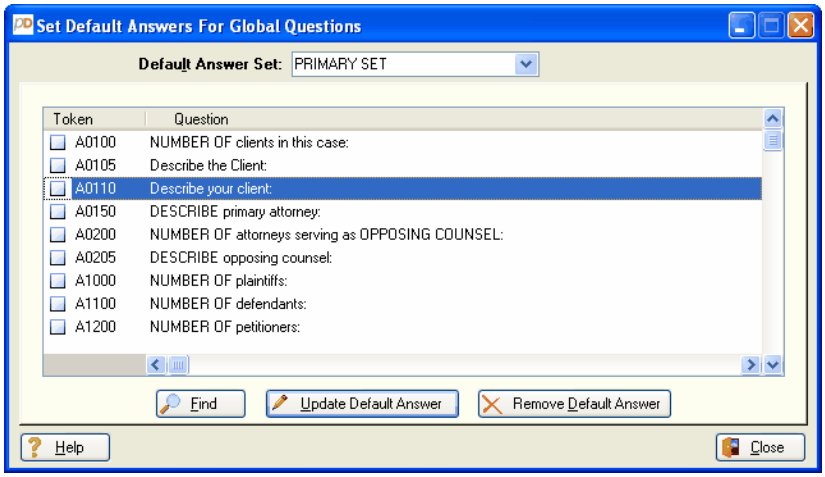


Figure 3-28, Set Default Answers for Global Questions Window

To create default answers, follow the steps below. The procedure is the same for Global, Volume and Supplemental questions, with one exception: for Volume and Supplemental questions, you must select a volume before seeing the questions.

1. Select the desired **Default Answer Set** using the drop down arrow. After selecting the set, you can scroll down and pick questions, or click **Find** to enter words to find one time or many times.

   NOTE: We recommend that you concentrate first on establishing defaults for your primary set. Then, when you feel that your primary set is firm, create optional sets by first copying your primary set or another user's primary set. This will save you from having to make double entries.

2. Double-click the question you want to answer, or click the question and click **Update Default Answer.**
3. In the window that appears, double-click the answer, or click it and click **OK.** You can also click **OK** to accept the highlighted answer. If the answer is a fill in the blank, type the answer or use a **QuickText** entry to answer it.
4. Repeat until you've set up all the default global answers you'd like to use.

After you've created a default answer for a question, a check mark will appear in the box next to the question in the **Set Default Answers** window. You can use the **Find** button to find a particular question. To update a default answer, highlight the question and click the **Update Default Answer** button. To delete a default answer, highlight the question and click the **Remove Default Answer** button.

Another way to set default answers is to do it during document assembly. Many users find it much easier and more convenient to set default answers this way. To do this while assembling documents:

1. Begin document assembly and work through the procedures to the question phase.
2. Select or type the answer you want to set as a default answer.
3. Click the **Set as Default Answer** button.
4. Select **Yes** on the confirmation window.

From that point forward, every time that question is first asked during document assembly, the default value will be displayed. This only changes if it is preempted by an answer you gave during a prior assembly session using the same case, or by a default answer calculated by ProDoc. To change the default answer, repeat the above steps. Also note that default answers are stored in the default answer sets. If you save answers in an optional set, the answers will only appear when you assemble documents while using the optional set.

Creating Default Answer Sets

This menu choice allows you to create a new default answer set or add a set created by another user. This is useful in many situations that arise when different users must work on the same computer or support multiple attorneys. From the **Main Menu**, click **Customize → Default answers→ Default answer sets**. A window similar to Figure 3-29 appears.

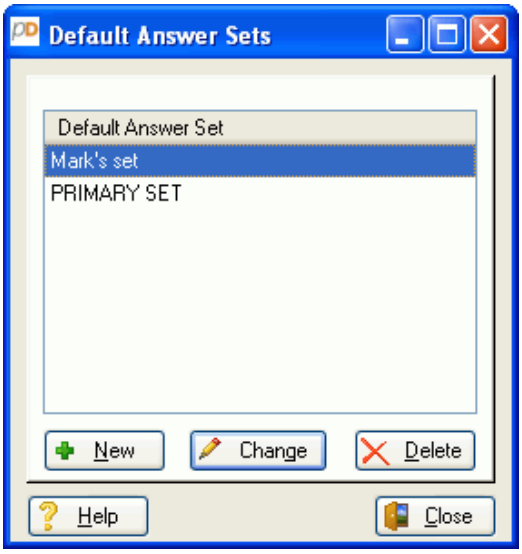


Figure 3-29, Default Answer Sets Window

This window allows you to create optional sets of default answers which you can pick from a drop-down list to use during an assembly session. For example, if a secretary prepares documents for three attorneys, a default answer set could be created for each attorney.

This doesn't change the default answer set that appears automatically during an assembly session. For help on choosing which set appears by default, see **Assembly Session Settings** 64.

The PRIMARY SET is the set containing all default answers that were entered before any optional sets were created. You can click the **New** button to create a new set, the **Change** button to change the name of the highlighted set, and the **Delete** button to delete the highlighted set.

To create a new set, click the **New** button. A **Default Answer Set Name** dialog window appears, similar to Figure 3-30. Note that if you are working in ProDoc for the first time on a new installation, there are no other user sets to copy.

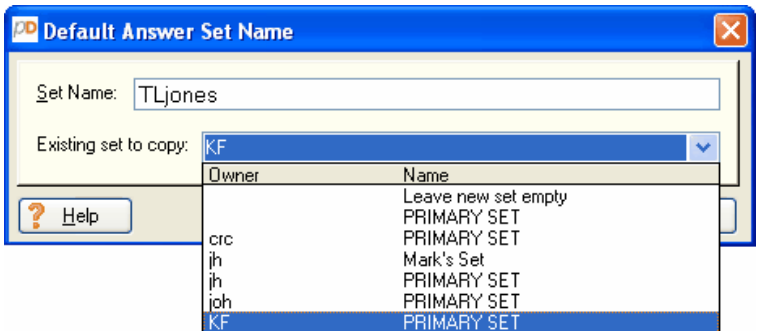


Figure 3-30, Adding a Default Answer Set

This browse window lists all of the default answer sets you can copy and use.

The **New** and **Change** buttons add new sets and change the names of existing sets, while the **Delete** button removes a default answer set from your list of sets.

Type in the **Set Name,** click the drop-down box to choose which **Existing set to copy**, then click the **OK** button. Your Primary Set and any added new sets will now appear in the **Default Answer Set** window and will be available for use when you begin assembling documents.

Using Default Answer Sets. You specify which default answer set to use for an assembly session when you reach Step 4 of the Starting Document Assembly window. If optional default answer sets exist, the window will contain a Default Answer Set drop-down box. Select the set you want to use from choices in the drop-down box. If no optional default answer sets exist, the window will not contain a **Default Answer Set** drop-down box, and the PRIMARY SET will automatically be used.

Specifying the Default Answer Set for Assembly Sessions. If you've added any optional sets, you can specify the one that appears by default during an assembly session. Click **Customize → Options**, then click the **Assembly Settings** link on the left side of the Options and Settings window. Select the set

you want to appear automatically from the drop-down list in the first field. You can still use any available set during an assembly session.

Edit Forms Menu

Edit Forms allows you to edit the master forms (or form templates) used in ProDoc. Use this option to open a forms management window where you can search for forms or select a volume to find the form(s) that you wish to edit. For detailed information on editing forms, see **Appendix B** 271 and **Appendix D** 294.

Form Sets Menu

Form sets are groups of forms that you often assemble at the same time. Using the Form Sets option, you define different sets of forms. All forms in the set can then be selected in the **Select Forms** window by selecting the form set rather than selecting each of the forms individually. For example, if you frequently prepare adoptions documents, you could define a form set called Adoption Starter, consisting of the forms in Figure 3-31. In order to select all of these forms at once, you could simply click the **Form Sets** tab in the **Select Forms** window and choose the "Adoption Starter" set.

Here is a step-by-step example showing how to create a form set:

Creating Form Sets.

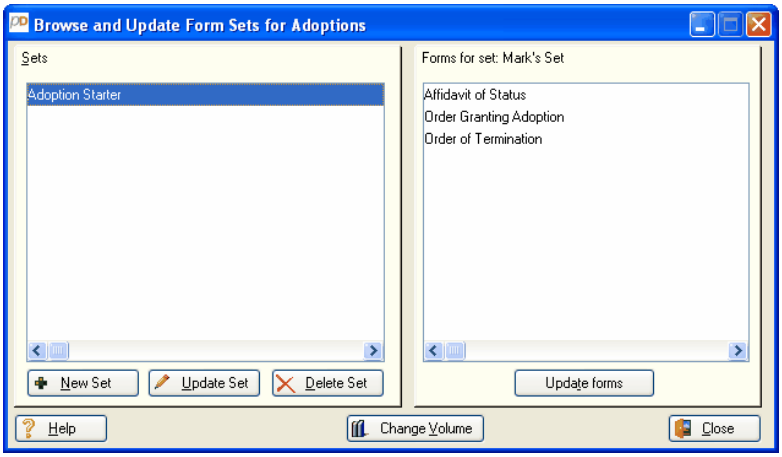


Figure 3-31, Browse and Update Form Sets Window

Click **Customize → Form Sets.** The Volume Selection Window appears. Select the volume you want to define a form set for. For this example, click **Family Law** and click the **Select** button to select the volume. The Browse and Update Form Sets window is shown in Figure 3-31. If you need a different volume, click the **Change Volume** button.

This is where you define your form sets. The **Sets** tab lists any existing sets in the volume. The **Forms for set** tab contains a list of the forms in the highlighted form set. The **New Set** button lets you create a new form set. The **Update Set** button lets you change the name of the highlighted form set. The **Delete Set** button allows you delete the highlighted form set. The **Update forms** button lets you add or delete forms to or from the highlighted form set.

To create a form set, click **New Set.** The **Form Set Name** box appears. Type the name of the form set, "Adoption Starter", then click **OK** to return to the **Browse and Update Form Sets** window. A form set named "Adoption Starter" now exists and appears in the list of form sets. It does not yet contain any forms. To add forms to the set, make sure the set name is the highlighted form set and then click the **Update Forms** button. A **Selecting Forms** window appears. Select all the forms that you want the form set to contain. Click **OK** to accept your selections and return to the Browse and Update Form Sets window. The forms you selected appear in the forms list in the **Forms for set** tab. You may return to the main menu by clicking the **Close** button.

Using Form Sets

Using a form set to select multiple forms to assemble is as easy as selecting a document. After selecting a volume during document assembly, a Select Forms browse window will appear. If one or more form sets have been defined for that volume, a **Form Sets** tab will be present. Click the **Form Sets** tab to see a list of the form sets. To select all of the forms in a form set, double-click the form set or highlight it and then click the **Select** button. The window will then switch to the **Selections** tab, which contains a list of all forms currently selected for assembly. If you want to deselect one of the listed forms, highlight the form and click the **Clear Selection** button. If you wish to select additional forms, click the **Numerical, Alphabetical** or **Form Sets** tab.

QuickText Menu

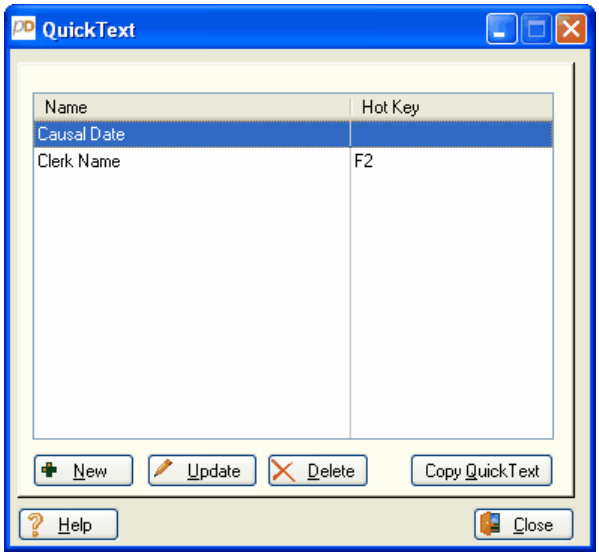


Figure 3-32, QuickText Browse Window

Click **Customize → QuickText** to see a window similar to Figure 3-32. This menu choice allows you to pre-define clauses or paragraphs you commonly use for answers. When you need to insert that clause into an answer, simply select the clause from this list. You can also set up a **QuickText** entry to automatically insert today's date. You can assign a hot key to any clause, and you can press that particular key combination to automatically insert the clause. For example, you could set up Ctrl-D as the hot key to insert today's date into an answer.

There is no limit to the number of entries you can have, and each can consist of over 3,000 characters.

The **New** and **Update** buttons add and change **QuickText** entries, while the **Delete** button removes entries. You can also double-click on the name of the **QuickText** entry to open the dialog window and edit the text string, or right click on a **QuickText** entry to bring up a drop-down menu to add, update, or delete an entry. The **Copy QuickText** button allow you to copy another user's entry for your own use.

Add/Update QuickText Records. To add or update a QuickText entry, click the **New** or **Update** button. The QuickText dialog box will appear. Enter the name of the QuickText entry and the text that will be pasted into the fill-in-the-blank answer. The name should be descriptive so you can easily find a QuickText entry during document assembly. Text can be entered as a single line or as multiple lines formatted as you would like it to appear in the finished document.

A QuickText entry can also be used to paste the current date rather than a fixed block of text. To create such an entry, select the **Date** option. The text field will be replaced with a drop-down box containing all the available date formats. Select the how you want the pasted date to be displayed. You may assign a hot key to any QuickText entry using the **Hot Key** drop down box.

Delete QuickText Record. To delete an entry, highlight it and click **Delete**. You will be asked to confirm the deletion before the entry is removed.

NOTE: To use a **QuickText** entry to paste a text block or the current date into a fill-in-the-blank answer, move the cursor to the point in the answer where you want the entry to be inserted.

Then click **QuickText**. This brings up the **QuickText Selection** window. Highlight the desired entry and click **Select**. The question window will appear with the entry pasted into the answer.

Alternately, you can use a hot key to paste a QuickText entry with a single keystroke. After moving the cursor to the point in the answer where you want the entry inserted, simply press the hot key for the entry. The entry will be inserted without you having to bring up the QuickText selection window.

Copying a QuickText Entry. Click the **Copy QuickText** button. The window that appears is depicted in Figure 3-33. This window allows you to copy other users' QuickText records for your own use. The window displays other users who've created records and the records they've created in a tree format. You can select individual records to copy, or you can copy all the entries made by another user.

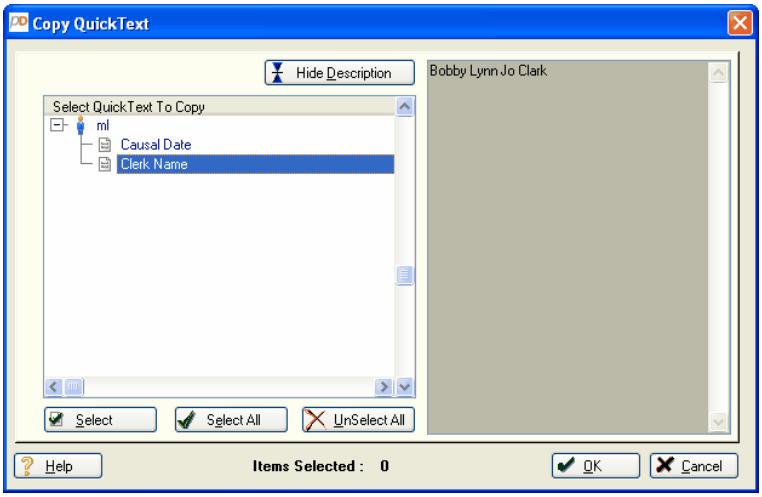


Figure 3-33, Copy QuickText Window

You can click the **Show/Hide Description** button to toggle between displaying only users (denoted by the icon) and displaying users and their records (denoted by the icon).

You can click the ⊞ icon to expand a user tree and reveal records. You can click the ⊟ icon to contract a user tree and hide the records.

To select one or more QuickText records to copy:

1. Click a record to highlight it. The actual entry will then be displayed on the right side of the window. If the entry is a date, the format for the entry will be shown.
2. Click the **Select** button to select the highlighted entry. A green check mark will appear next to the entry on the list. Repeat this process for any entries you wish to copy.
3. If you wish to select **all** QuickText entries for a particular user, click the user's login name or initials and click the **Select** button.
4. Click the **UnSelect** button to remove a highlighted entry from your selections. Click the **UnSelect All** button to remove all selections and start over.
5. When you are satisfied with your selections, click the **OK** button. A message window will appear telling you that your selections were copied. If you want to print the information displayed in this window, click the **Print** button.
6. Click the **Close** button to return to the **QuickText** browse window, where your selections will appear.

Firm Information Menu

Click **Customize → Firm Information** to bring up the **Firm Information** box on the **Options and Settings Window** (Figure 3-34).

(If available)

Information you enter here becomes part of ProDoc software's global information database and selectively becomes available for insertion for applicable questions during document assembly. Fill in all fields (except the Firm Name field, which cannot be changed here), or edit the fields as needed, and click the OK button. The required entries are Firm Name (already completed), the first Address field, City, State, Zip Code and Phone. The other fields are optional, but you should still complete the fields that apply to your firm. Enter the information carefully; this information will appear on many of your documents.

The Firm Name field was completed when you registered ProDoc. If you need to change the name, go to the Main Menu and click Tools → Registration → Change Firm Name. Click here 80 for detailed help with this menu choice.

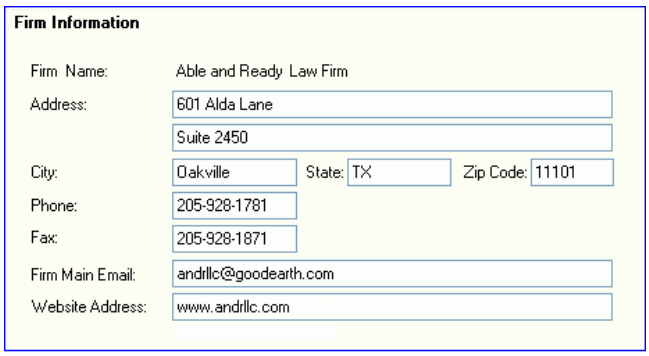


Figure 3-34, Firm Information Fields

Options Menu

From the main menu, you can click **Customize → Options** to choose virtually all of your system settings. Each of the settings listed on the left side of the **Options and Settings** window, shown in Figure 3-35, is explained in detail in its own section, in the order shown on the window.

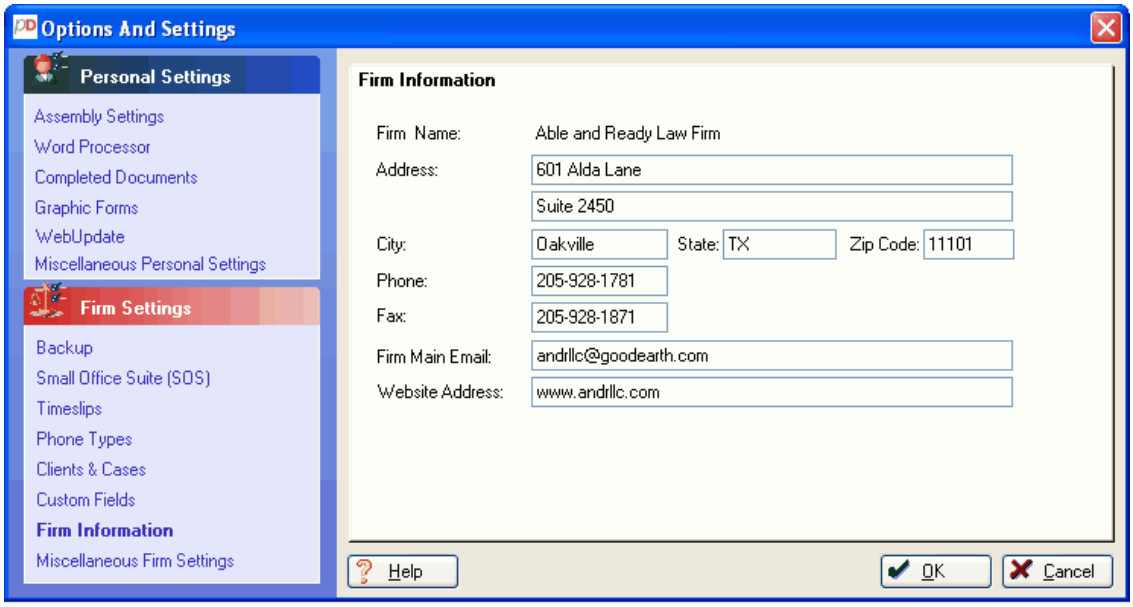


Figure 3-35, Options And Settings Window

Assembly Settings

Click the **Assembly Settings** link on the **Options and Settings** window to bring up a box similar to Figure 3-36. These settings control the ways in which you and ProDoc interact while you assemble documents. Use the drop down arrows and check boxes to change settings as desired.

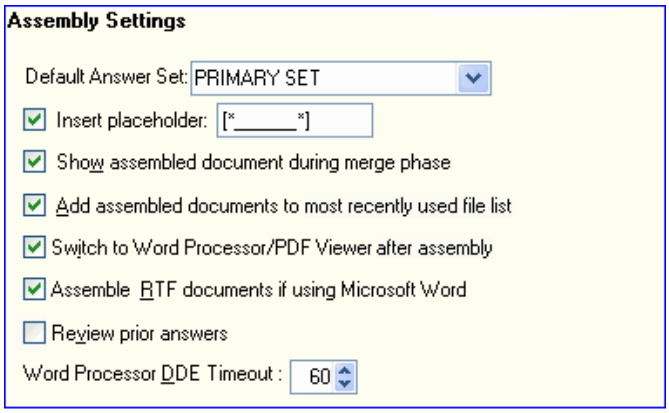

Assembly Settings
Default Answer Set: PRIMARY SET
Insert placeholder: [*_____*]
Show assembled document during merge phase
Add assembled documents to most recently used file list
Switch to Word Processor/PDF Viewer after assembly
Assemble RTF documents if using Microsoft Word
Review prior answers
Word Processor DDE Timeout : 60

Figure 3-36, Assembly Settings

This window permits you to set the following defaults:

Default Answer Set – The "Primary Set" appears in this field. If you have created any optional default answer sets, you can reveal these by clicking the down arrow. The set you select here will be automatically used by ProDoc when you assemble forms and print custom worksheets.

Insert placeholder – This field is used to tell ProDoc to insert a placeholder any place where you skipped past a question without entering an answer. You can enter anything you like here; a common entry is a long blank line, "_____".

Show assembled document during merge phase – The second phase of a document assembly session is called the merge phase, where you fill in blanks with names, addresses, dates, etc. If you select this option, the assembled document will be displayed on screen so that you can actually see the blank you are filling in. If you do not select this option, each question will pop up in a dialog box and you will be provided with a field to enter your answer, which will later be merged into the document.

Add assembled documents to Word Processor's most recently used file list – You will want to leave this checked since newer versions of WordPerfect and Microsoft Word display the most recently opened documents at the bottom of the drop-down Files menu. ProDoc automatically adds documents to that list as they are assembled if this option is selected.

Switch to Word Processor after assembly – After assembling documents, ProDoc can automatically start your word processor and open the file(s) just assembled. This allows you to instantly edit and print the assembled document.

Assemble RTF documents if using Microsoft Word – After assembling a WordPerfect document, ProDoc will convert it to RTF format if your word processor is Microsoft Word and this option is selected. You will usually want to select this option since Microsoft Word displays and prints RTF files more accurately than it displays and prints WordPerfect files. Selecting this option has no effect if your word processor is WordPerfect.

Review prior answers – This setting controls the default setting for the **Review prior answers** check box when you start an assembly session. If you check this box, you will be asked all document assembly questions during subsequent assembly sessions by default. If you want to skip questions you have already answered during document assembly, you will need to uncheck the **Review prior answers** box on the **Starting Document Assembly** window. If you want the most flexibility, leave this box unchecked.

Word Processor DDE Timeout – Leave as is. ProDoc interacts with your word processor using a process known as Dynamic Data Exchange. On some systems, particularly networks, the process of starting up a word processor and sending messages back and forth may be slower than normal. If you are having problems such as Invalid page fault, Illegal operation, etc. when ProDoc attempts to start or switch to your word processor, try increasing the value in this field by 30 seconds at a time. This tells ProDoc to wait longer before it determines that a DDE transaction failed.

Word Processor Settings

Click the **Word Processor** link on the **Options and Settings** window to bring up a box similar to Figure 3-37. This option box allows you to change your word processor and install a ProDoc toolbar in the program.

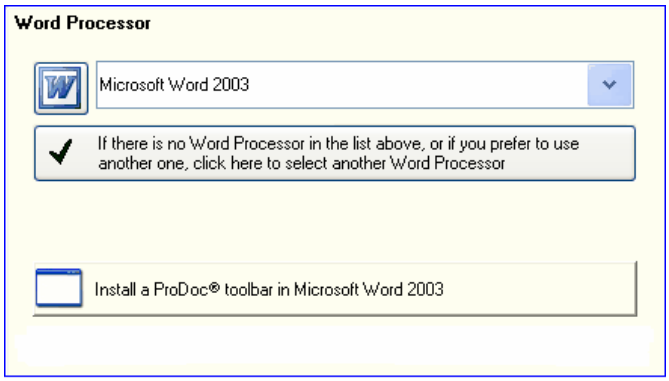

Word Processor
Microsoft Word 2003
If there is no Word Processor in the list above, or if you prefer to use another one, click here to select another Word Processor
Install a ProDoc® toolbar in Microsoft Word 2003

Figure 3-37, Word Processor Settings

This screen lets you see what word processor you are using with ProDoc. ProDoc automatically finds and sets up your word processor when it is installed. This screen allows you to change to a different word processor than the one noted on the screen. Having the correct word processor chosen is very important in controlling a number of features that help you save time in document assembly.

Normally, you will not need to change this setting. However, if you prefer to change to a different word processor or your word processor is not displayed on the screen, you may browse to the word processing program you use:

1. Click the large button titled **If there is no Word Processor in the list above, or if you prefer to use another one, click here to select another Word Processor**.
2. Two fields open underneath the button you clicked.
3. Click the drop-down arrow to the right of the top field and you will see a list of word processors to choose from. Locate your word processor on the list and highlight it. If it is not listed, click **Other.**
4. Click the folder icon that appears to the right of the **Location of Word Processor** field.
5. The **Select your Word processor** box appears.
6. Browse to the executable file for your word processor. Executable files have the extension ".exe" at the end of the file name.
7. Highlight the correct file and click **Open** to place the full command line path in the dialog box.
8. Click **OK**.

If you select **Other**, please note that ProDoc software only fully supports the use of Microsoft Word and WordPerfect. However, you can open ProDoc documents with any word processor which can open and work with WordPerfect 5.X/6.X files. ProDoc software's normal word processing interactions will not function with unsupported word processors. At a minimum, you will have to open completed documents manually.

Installing a ProDoc toolbar in your word processor

To install a handy document manager toolbar in your word processor, click the **Install a ProDoc toolbar in…** button at the bottom of the screen. The ProDoc toolbar that now appears in your word processor features icons (with descriptive tool tip pop-ups) that perform the following functions when you click them:

Start ProDoc or toggle to ProDoc if already running.

Start a new document. A dialog window appears where you can fill in the indicated fields. You can associate your new document with an existing ProDoc client and case for tracking purposes. Click the drop down arrow to the right of each field to select the client and case.

Open an existing document.

Save the opened document.

Search for documents using key words or advanced matching options.

Removing the ProDoc toolbar and menu choice from WordPerfect

To remove the ProDoc toolbar and menu selection from WordPerfect, open WordPerfect. On the menu, click **Edit** and then **Settings**. Click the **Customize** icon in the Settings box. The Customize Settings box appears. To remove the ProDoc toolbar, select the **Toolbars** tab and remove the check from the ProDoc Organizer check box. To remove the ProDoc menu selection, select the **Menus** tab and highlight **ProDoc Organizer**. Click **Delete** and then click **Close**.

Removing the ProDoc toolbar and menu choice from Word

To remove the ProDoc toolbar and menu selection from Word, open ProDoc and click **Customize ? Options.** Click the **Word processor** link on the left side of the window. Click the **Remove Word Processor Toolbar** button.

Completed Documents Settings

Click the **Completed Documents** link on the **Options and Settings** window to bring up a box similar to Figure 3-38. This option box allows you to specify file locations for finished documents; choose a folder naming convention; and choose a default file name type.

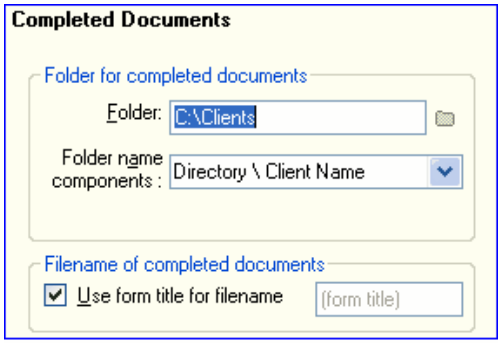


Figure 3-38, Completed Documents Settings

Use this window to specify the way you want ProDoc to work during a document assembly session. The following default options can be set from this window: Folder for Completed Documents 67 and Filename of completed documents 67.

Folder for Completed Documents

Folder – The location specified in this window is used as the default location in the Starting Document Assembly window. Generally, this will be something like F:\clients if you are a Network user or C:\Clients if you are single user. If you want to choose the directory from a browse listing, click the browse button to the right of the box and select the drive and directory from the directory browse window. Any path components specified above are appended to the directory.

Folder Name Components – You can choose to store assembled documents in subfolders under the folder specified above. Subfolders will be based on the client name or client ID and the case description or case ID for the client and case selected for the assembly session. To select the components to use, click the down arrow to open the drop down list box. To select a path component set from the list, click it. The following list shows the locations that correspond to the various path component sets with a folder of "F:\clients" for an assembly session using the client "John J Smith" with a client ID of "ALS-SJJ-123" and the case "Divorce" with a case ID of "SJJ-DIV".

Folder Name Components....Location

Directory\Client Name....F:\clients\Smith, John J

Directory\Name\Case Description....F:\clients\Smith, John J\Divorce

Directory\Client Name\Case ID....F:\clients\Smith, John J\SJJ-DIV

Directory\Client ID....F:\clients\ALS-SJJ-123

Directory\Client ID\Case Description....F:\clients\ ALS-SJJ-123\Divorce

Directory\Client ID\Case ID....F:\clients\ALS-SJJ-123\SJJ-DIV

Directory\Case Description....F:\clients\Divorce

Directory\Case Description\Client Name....F:\clients\Divorce\Smith, John J

Directory\Case Description\Client ID....F:\clients\Divorce\ ALS-SJJ-123

Directory\Case ID....F:\clients\SJJ-DIV

Directory\Case ID\Client Name....F:\clients\SJJ-DIV\Smith,John J

Directory\Case ID\Client ID....F:\clients\SJJ-DIV\ALS-SJJ-123

NOTE: Any blank components, such as a blank Case ID, are omitted. If no case is used for the assembly session, no components are appended to the folder.

Filename of completed documents. By default, the **Use form title for filename box** is checked. When this box is checked, ProDoc will use the title of the form as the filename of the document you assemble. The filename cannot be changed in the Starting Document Assembly window. Also, fields for entering filenames for clients and cases will be removed from the Client Dialog Window and Case Dialog Window.

If you remove the check from this box, you can specify a filename for all documents you assemble in the field provided. You can change this filename in an assembly session.

If you assemble the same document for a case more than once, ProDoc will use the filename you specify and add "-#2" to the filename. The numerals advance as instances occur.

Graphic Forms Settings

Click the **Graphic Forms** link on the **Options and Settings** window to bring up a box similar to Figure 3-39. The options here let you customize settings for filling, completing and printing graphics-type forms.

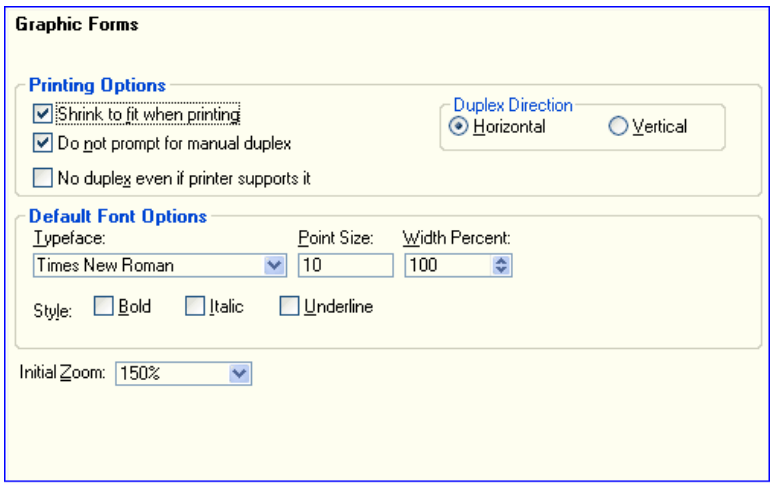


Figure 3-39, Graphic Forms Settings

This window allows you to customize settings for completing and printing graphics forms. In most cases, the default settings will result in an excellent finished product. A description of the fields and choices follows:

Shrink to fit when printing - ensures graphic forms designed for one page actually print on one page without border breaks to a second page.

Do not prompt for manual duplex - this refers to a prompt which will ask you if you want to print on both sides of the paper. When this box is checked, the prompt is disabled.

No duplex even if printer supports it - when checked, disables printing on both sides of a page.

Duplex Direction - can be **horizontal** or **vertical**. Horizontal will result in a two-sided printed page that you can pick up from the bottom to read the back. Vertical will print the back so that you can flip the right edge and read the back.

Typeface - identifies the default typeface for filling a form. You can change this typeface by clicking the drop-down arrow in the field and clicking on a different typeface.

Point Size - One point is 1/72nd of an inch, so 12 point type would be 1/6th inch high. Standard sizes for most correspondence is 10 point or 12 point type. You can change this by manually typing the entry in the field.

Squish Percent - the relative size of the form's width as it is displayed in ProDoc. You can change this with the spin button or by typing the percentage you want in the field.

Style - Can be set to normal (nothing checked) or **Bold**, **Italic**, or **Underline**. To use a style, click the box next to the style you want to use.

Initial Zoom - the relative size of the entire form as it is displayed in ProDoc. You can change this by using the drop-down arrow and selecting the percentage you want from the choices displayed.

WebUpdate Settings

WebUpdate runs automatically the first time ProDoc is opened, by default. When you start ProDoc, the program checks the ProDoc server for updates. If updates are available, a window is displayed listing these updates. You can change the setting by clicking **Customize → Options → WebUpdate** and checking or clearing the **Disable WebUpdate** check box. If you disable **WebUpdate,** you can manually check for updates anytime by clicking **Tools → Check for Updates.**

If the feature is enabled, the program will check the ProDoc software's online server for updates needed for your installation when you initially run ProDoc each day. A box will appear indicating that ProDoc is checking for updates. If no updates are found, the box closes. If updates are available, the **Updates for ProDoc are now available** window appears. You have three choices on this window:

- Click **Download and Apply All Updates** to download all updates. The updates will be

downloaded, and a window will be displayed which tells you the updates have been downloaded. You will be prompted to restart ProDoc to install the updates. After ProDoc restarts, the downloaded updates will be installed.

- Click **Select Updates to Download and Apply** to open a window displaying available updates and a description of each update available. The selection box for each update will be checked. We recommend you download each available update. If you want to exclude an update from download, click the update's check box to clear it, and the update will not be downloaded. Click **Begin Download** to download the selected updates. If you don't want to download updates at this time, click **Cancel.**
- Click **Do Not Download Updates at this time** to close the update window without downloading any updates.

Miscellaneous Personal Settings

Click the **Miscellaneous Personal Settings** link on the **Options and Settings** window to bring up a box similar to Figure 3-40. These options include the ability to show/not show the Quick Start Assistant or the Quick Click Menu; use/not use the ProDoc software's PDF Reader to view Adobe PDF documents; and restore ProDoc software's original window positions for all windows.

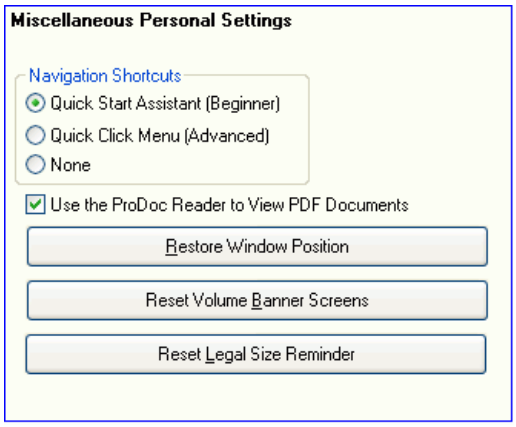


Figure 3-40, Miscellaneous Personal Settings

This window allows you to set miscellaneous defaults that only take effect when you log in to ProDoc.

Quick Start Assistant (Beginner) - When this button is selected, ProDoc automatically brings up the Quick Start Assistant for your use after you log in. This is recommended for beginning users.

Quick Click Menu (Advanced) - When this button is selected, ProDoc automatically brings up the Quick Click Menu for your use after you log in. This is recommended for users who are familiar with the program.

None - When this button is selected, neither of the above starts.

Use the ProDoc PDF Reader to view PDF Documents - When checked, ProDoc will use its embedded PDF reader to view PDF documents. If unchecked, Adobe Reader or another program you've designated on your computer to open PDF documents will start and display PDF documents when you select these while working in ProDoc. If you have Adobe Reader, you would normally want to uncheck this box.

Restore Window Position - Click this button to reset all ProDoc windows to appear in their original positions and size.

Reset Volume Banner Screens - Click this button to have ProDoc display volume banner screens when you assemble documents.

Reset Legal Size Reminder - Click this button to set the legal size paper reminder for printing on and off.

Backup Settings

Click the **Backup** link on the **Options and Settings** window to bring up a box similar to Figure 3-41.

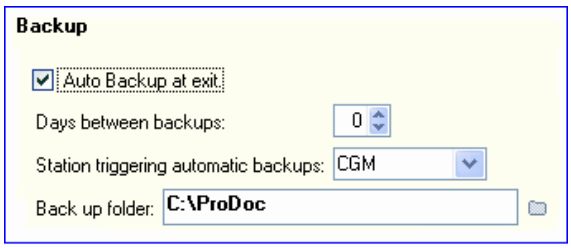


Figure 3-41, Backup Settings

The choices on this window control backup settings. We recommend you use the settings shown in Figure 3-41 unless you are a Small Office Suite user.

Auto Backup at exit - If you do **not** use SOS, you should ensure this option is selected. If this option is selected, ProDoc will periodically automatically make backup copies of client and case data files when you exit ProDoc. The backup copies are stored in the ProDoc home directory by default, but you can save these in any valid drive/folder by changing the entry in the **Backup folder** field. **SOS subscribers should leave this box unchecked**. This is recommended because SOS backs up more data files, and using ProDoc backup and restore can damage SOS data files.

If you have SOS installed and you select **Auto Backup at exit**, you will see a warning screen when you click **OK** on this window. The warning tells you that you should use SOS for backing up your data. The warning screen provides a **Disable Backup** button to disable automatic backup in ProDoc. If you click the button, you will see a window confirming that the automatic backup is disabled. The window will also ask you to enable automatic backup in SOS.

If **Auto Backup at exit** is not selected, the remaining fields here are disabled.

Days between backups - Specifies how many days to skip between performing automatic backups. No backup is done if the difference between the current date and the date of any existing backup copies is less than the frequency. If the frequency is zero then a backup is always done.

Station triggering automatic backups - Ensure that this field contains the log in identification of a person in your office who regularly uses ProDoc.

Backup folder - Specifies the folder which receives backup data files. The default is the ProDoc installation folder. You can type in another folder name or use the browse folder button next to the field to select another folder.

Small Office Suite (SOS) Settings

Click the **Small Office Suite (SOS)** link on the **Options and Settings** window to bring up a box similar to Figure 3-42. The box helps you designate amounts to charge, using SOS charge slips, for assembled documents. If you have SOS installed, you can designate billing amounts for documents and automatically generate charge slips when you complete a document. See the **SOS Manual** for detailed help in setting up billing options and using charge slips in SOS.

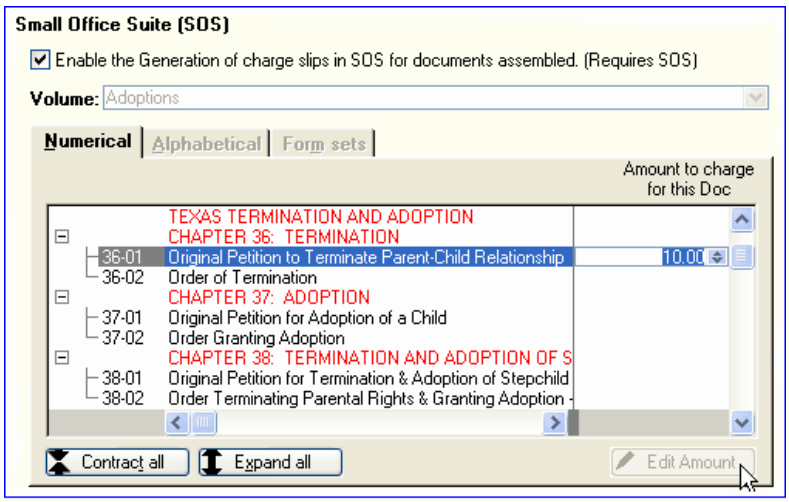

Small Office Suite (SOS)
Enable the Generation of charge slips in SOS for documents assembled. (Requires SOS)
Volume: Adoptions
Numerical
Alphabetical
Form sets
Amount to charge for this Doc
TEXAS TERMINATION AND ADOPTION
CHAPTER 36: TERMINATION
36-01 Original Petition to Terminate Parent-Child Relationship 10.00
36-02 Order of Termination
CHAPTER 37: ADOPTION
37-01 Original Petition for Adoption of a Child
37-02 Order Granting Adoption
CHAPTER 38: TERMINATION AND ADOPTION OF S
38-01 Original Petition for Termination & Adoption of Stepchild
38-02 Order Terminating Parental Rights & Granting Adoption
Contract all
Expand all
Edit Amount

Figure 3-42, SOS Settings

Enable the Generation of billing slips in SOS for documents assembled. (Requires SOS) – Place a check in this box if you would like to enable the feature that allows you to automatically bill your clients in SOS for the documents that you assemble. To select documents and specify amounts:

1. Choose a **Volume** by clicking on the drop down arrow field.
2. Arrange the list of volume forms either by **Numerical** or **Alphabetical** order by clicking the appropriate tabs.
   a. If you list forms numerically, you can also use the **Contract All** or **Expand All** buttons to reveal chapters only or all forms grouped by chapters.
   b. In a numerically ordered list, you can also click the ⊞ button or ⊟ button to reveal or hide forms in a chapter.
3. If desired, you can click the **Form Sets** tab to display a form set you've created. You can then specify the amount you want to charge for the complete set.
4. Select the desired form by clicking it once. Click the **Edit Amount** button and enter the desired dollar amount to charge for assembling the document.
5. Repeat the process as needed.

Generating Charges in SOS for Completed Documents

If you have enabled the feature, the **Charges to Generate In SOS** window appears after you have assembled one or more documents listing an amount to charge. This window only opens if you used a case file. The information that appears on the screen is the **Activity/Doc Name, Fee Charged** and **Timekeeper.**

If a **T** appears before a charge on the list, it means that the charge will not be billed but will be **tracked** for the case. If a **B** appears before a charge on the list, it means that the item will be billed to the case. You may choose whether to **Track** or **Bill** charges by highlighting the charge and clicking on the **Track this Charge (Will Not Generate a Billable Slip)** or **Bill this Charge (Will Show as a Billable Slip)** buttons that appear in the **Charge Tracking/Billing** field of the **Charges to Generate In SOS** window.

Highlight a charge and click the **Edit Charge** button to adjust the **Activity Name, Fee** or **Timekeeper.** If you want to remove the charge so that it does not appear in the **Charges to Generate In SOS** window, highlight the charge and click the **Delete Charge** button. Clicking the **Consolidate All** button will allow you to generate one flat fee slip for the total amount of the documents that have been assembled instead of separate slips for each document's specified amount. Click **Generate Charges** to create SOS billing slips for the documents that have been created. Click **Cancel Charges** to close the

Charges to Generate In SOS window.

Timeslips Settings

Click the **Timeslips Settings** link on the **Options and Settings** window to bring up a box similar to Figure 3-43. This window is only applicable for Timeslips version 9.1 and newer users who have interfaced Timeslips with ProDoc. Use this window to set up phone types and name mapping .

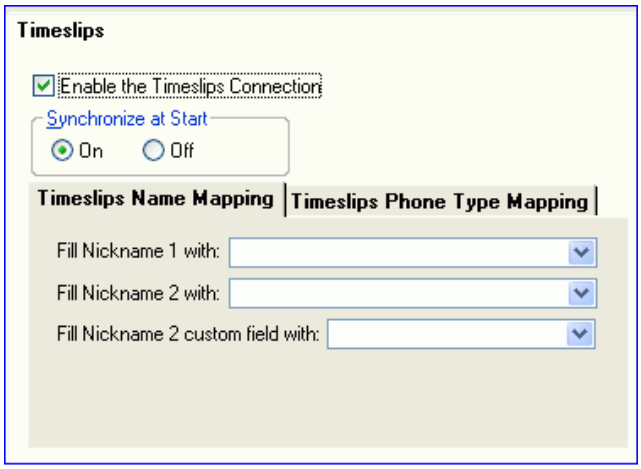


Figure 3-43, Timeslips Settings

For detailed help with synchronizing Timeslips and ProDoc, see **Appendix C** 281 of this manual.

This window is only applicable for **Timeslips version 9.1 and newer** users who have interfaced Timeslips with ProDoc.

The Timeslips extension gives you the ability to bill your clients by generating "slips" for each document created in ProDoc. Generating a slip takes place after document assembly in ProDoc and before the document is opened in the word processor.

CAUTION: Do not use ProDoc with a version of Timeslips (e.g., Timeslips Express) that does not allow you to use "project separators". "Project separators" distinguish clients and cases. Using ProDoc with a version of Timeslips that does not use "project separators" will cause the loss of important data.

Enable the ProDoc to Timeslips Connection the next time ProDoc is started. (Requires Timeslips) – Place a check in this box if you would like to enable the feature that allows you to synchronize Timeslips and ProDoc for client and document billing purposes.

Synchronize at Start – Click the **On** button to have ProDoc automatically start the synchronization of Timeslips and ProDoc data when you start ProDoc. Click the **Off** button to synchronize data only when you choose to do so.

Use this window's **Timeslips Name Mapping** tab to match the Nickname 1, Nickname 2, and Nickname 2 custom field parameters in Timeslips to match the corresponding fields in ProDoc. Select the entry types with the drop down arrows next to the fields. If you leave these fields blank, Timeslips will use Client and Case IDs for the Nickname1 field.

Use the **Timeslips Phone Type Mapping** tab to match the Timeslips and ProDoc phone type fields. Select the phone types using the drop down arrows next to the fields.

Phone Types Settings

Click the **Phone Types** link on the **Options and Settings** window to bring up a box similar to Figure 3-44. Timeslips users can use this tab to change the order of phone number listings to conform with the

scheme in Timeslips. ProDoc allows you to store many phone numbers for a client. Timeslips limits this option to four phone numbers.

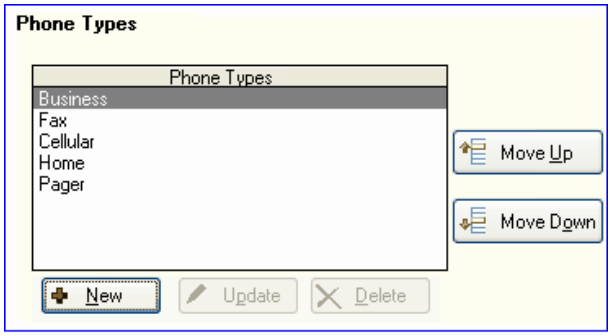


Figure 3-44, Phone Types Settings

Use this window to insert, change or delete phone types for your contacts with the controls provided.

From the **ProDoc Options** Window, Timeslips users can use the convenient **Move Up** and **Move Down** buttons to adjust the order of the various phone types to properly match the ProDoc software's phone listings with those in Timeslips. Changing these settings will also determine how phone types are displayed when you add or update phone types for clients.

You can use the **New**, **Update** or **Delete** buttons to add, change or delete phone types. Any new phone types you create can be updated or deleted. **Home**, **business** and **fax** phone types cannot be deleted or updated.

Clients & Cases Settings

Click the **Clients & Cases** link on the **Options and Settings** window to bring up a box similar to Figure 3-45. This box allows you to specify the use of unique IDs to identify clients and cases.

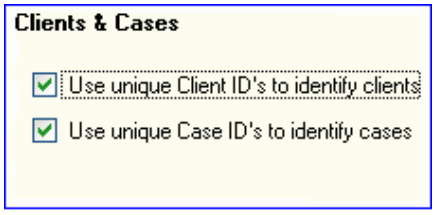


Figure 3-45, Clients & Cases Settings

This window allows you to use or not use unique IDs for clients and cases.

Use unique Client IDs to identify clients – (Mandatory for Timeslips users) - Click this box to specify a client ID for each client. This requires that each client ID be unique (no duplicates). If you plan to use an ID for each client, you should check this box to ensure no two clients share the same ID. An example of a client ID could be 2005-ALS-2311, which would show the year the client was opened, the attorney who opened it and the actual client number. If you turn this feature on, then when adding a new client to the system, the client ID field must be left blank or a unique number must be entered.

Use unique Case IDs to identify cases – (Mandatory for Timeslips users) - Similar to the client ID above, this allows you to specify a case ID for each case. The case ID must be unique (no duplicates) for each client, although different clients can share the same case ID (two clients can have a case ID called divorce). If you plan to use an ID for each case, you should check this box to ensure no two cases for the same client share the same ID. If you turn this feature on, then when adding a new case to the system, the case ID field must be left blank or a unique number must be entered.

Leave either box blank to let ProDoc know you don't want to use client or case IDs. This will prevent the fields for these items from being displayed on client and case add/update windows.

Custom Fields Settings

Click the **Custom Fields** link on the **Options and Settings** window to bring up a box similar to Figure 3-46. This box lets you build up to six separate custom fields for Clients and Cases. Simply type in any desired Client fields, such as "SSN", in the space provided, or type in Case custom fields such as "Opposing Counsel". Then click **OK**.

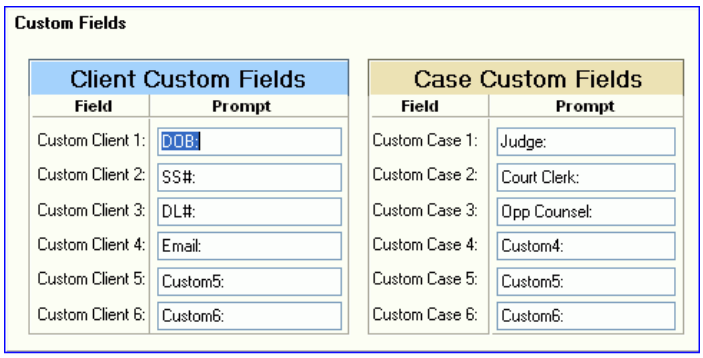


Figure 3-46, Custom Fields Settings

Firm Information Fields Settings

(If available)
Click the **Firm Information** link on the **Options and Settings** window to bring up a box similar to Figure 3-47. This box lets you enter or edit relevant firm information **(except your Firm Name, which cannot be changed here)** so you can avoid entering it on each document, form or report.

The Firm Name field was completed when you registered ProDoc. If you need to change the name, go to the Main Menu and click Tools → Registration → Change Firm Name. Click here 80 for detailed help with this menu choice.

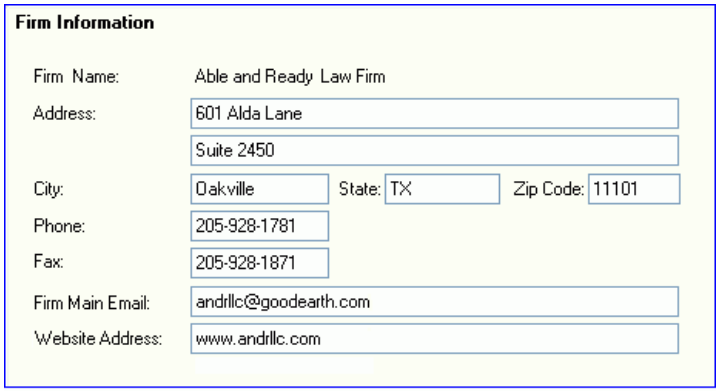


Figure 3-47, Firm Information Settings

(If available)

The required entries are **Firm Name (already completed)**, the first **Address** field, **City, State, Zip Code** and **Phone.** The other fields are optional, but you should still complete the fields that apply to your firm. Enter the information carefully; this information will appear on many of your documents.

Firm Information in Answers

The **Firm Information** fields are entered when you install ProDoc. The information in these fields **overrides** any changes made by setting default answers or changing case answers. ProDoc will always display the current firm information as the suggested/displayed answer during assembly sessions.

This applies to all **Firm Information** fields, including firm name, address, city, state, zip code, phone/fax numbers, email and Web site name.

(If available)

Changing Firm Information Default Answers. To change the default answer for the Firm Name, you must click Tools → Registration → Change Firm Name. To change default answers for all other firm information fields, you must click **Customize → Firm Information** and make the changes on the **Options And Settings** window.

Miscellaneous Firm Settings

Click the **Miscellaneous Firm Settings** link on the **Options and Settings** window to bring up a box similar to Figure 3-48.

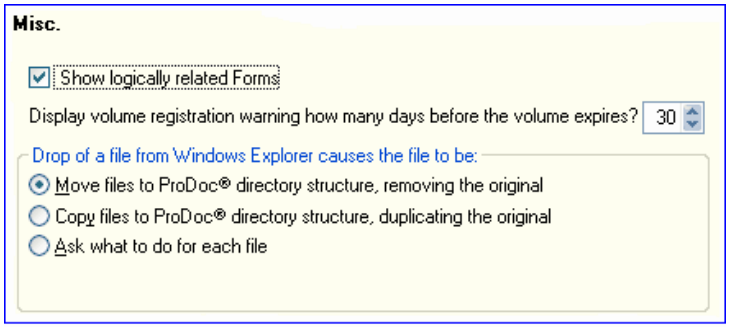

Misc.
Show logically related Forms
Display volume registration warning how many days before the volume expires?
30
Drop of a file from Windows Explorer causes the file to be:
Move files to ProDoc® directory structure, removing the original
Copy files to ProDoc® directory structure, duplicating the original
Ask what to do for each file

Figure 3-48, Miscellaneous Firm Settings

This window allows you to specify settings for revealing related forms during an assembly session; lead time for warnings about volume expiration; and how to handle Windows Explorer file moves.

Show logically related Forms – If this box is selected, ProDoc will note when you fail to select a form logically related to the form you've chosen during an assembly session or when defining a form set. The **Select Forms** window will appear to give you another chance to select logically related forms.

Display volume registration warning how many days before the volume expires? - Use the spin buttons here to select the lead time for getting a warning that a volume is going to expire. The warning will start appearing when a volume's expiration date reaches the number of days that you have set in this field.

Use the selections under **Drop of a file from Windows Explorer causes the file to be:** to tell ProDoc how you want the source and destination file to be treated while using Windows Explorer for drag and drop operations in the Document Manager. For more information on these settings and the drag and drop function, click **here** 39.

Tools Menu

This menu choice brings up useful utility programs which perform external and housekeeping tasks.

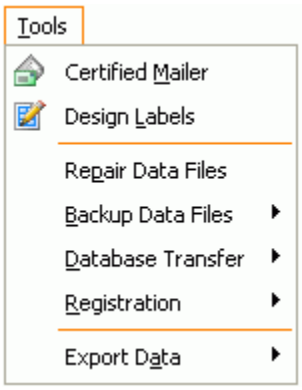


Figure 3-49, Tools Drop-Down Menu

Certified Mailer 76 opens the Certified Mailer program to help you create and print certified mail labels for your certified letters and packages.

Design Labels 77 brings up a pick list of available label formats.

Repair Data Files 78 is a utility you can use whenever you suspect a data file is damaged.

Backup Data Files 78 lets you backup or restore data files.

Database Transfer 79 enables you to transfer contact data files to a system using ProDoc which doesn't already have access to your files. You can also import contact data that was exported from another ProDoc system.

Registration 79 lets you manage all licensing and registration for ProDoc, including volumes and PowerPacks.

Export Data 85 lets you export contacts, cases and answers to questions. This is useful if you expand ProDoc to another computer system.

Certified Mailer

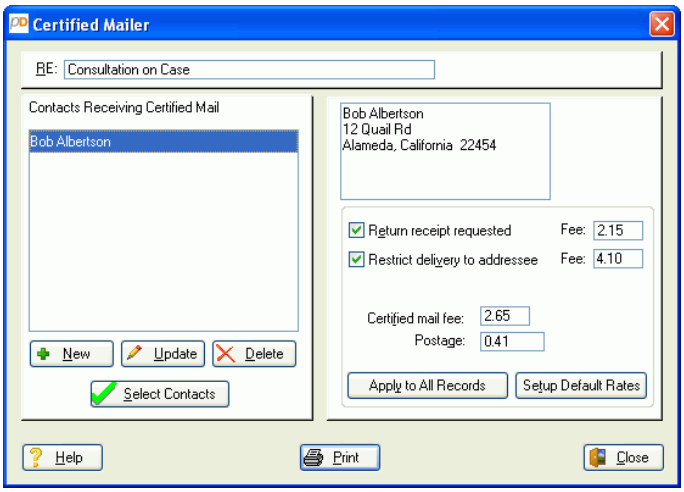


Figure 3-50, Certified Mailer Window

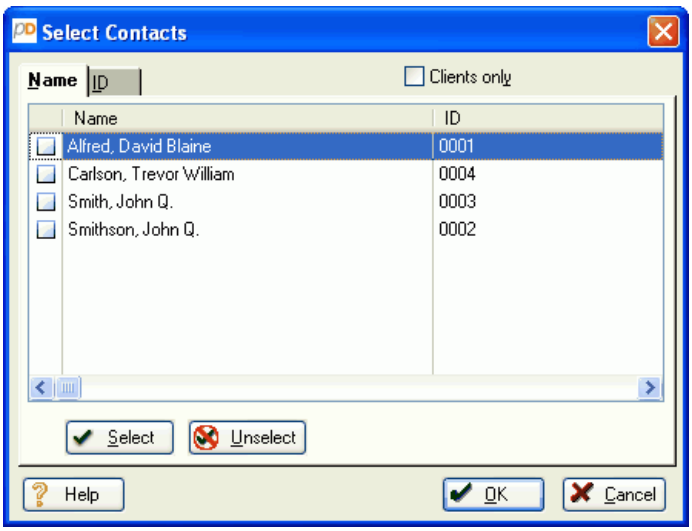
Law offices normally send a large amount of certified mail. The **Certified Mailer** feature makes it easy to produce certified mail labels by automating the process. Figure 3-50 depicts the Certified Mailer window.

You can quickly choose clients from your database, or you can add addressees that are not in your database.

Before you can use this feature, you will need to purchase certified mail shipping labels. You can buy labels from most office supply stores. The certified mailer program works well with Walz™ Form 35663 Certified Mailer forms.

To produce certified mail labels:

1. From the **Main Menu**,click the **Cert. Mailer** button or **Tools → Certified Mailer**. Type in the subject of the mail in the **RE:** box at the top.
2. If you need a label for one or more contacts in your database, click **Select Contacts**. The **Select Contacts** window appears, similar to Figure 3-51.



Select the contact by clicking in the box next to the name(s), or by highlighting the name(s) and clicking the **Select** button. If you want to limit your choices to clients only, click the **Clients only** box.

Click the **Unselect** button to remove a previous choice. Click **OK**.

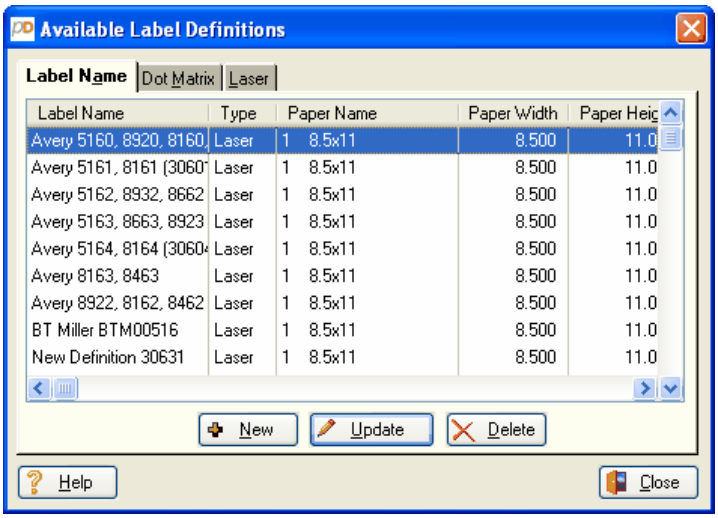
Figure 3-51, Select Contacts Window

3. The contact(s) will appear in the Certified Mailer box as receiving the certified mail. Repeat as needed.
4. If you need to add addressees who are not in your ProDoc database, click the **New** button and enter their address. Click **OK.** Repeat as needed.

   NOTE: Any person(s) and mailing addresses you add here do **not** become a part of your ProDoc client database.
5. Choose **Return receipt requested** or **Restrict delivery to addressee** as desired by clicking in the boxes. Enter or change the fees using the appropriate boxes.
6. Determine the certified mail fee and postage. You can enter these for each addressee by clicking on the name on the left side of the window, then entering amounts in the boxes on the right side of the window. You can also click **Apply to all records** to apply what you've entered to everyone receiving the mail. Use **Setup Default Rates** to set options and amounts for future use.
7. Review your selections. You can change options, addresses and amounts by highlighting the addressee and making the desired changes on the right side of the window. You can also do this in a separate window by highlighting the name and clicking **Update.** Click **OK** to return to the Certified Mailer window.
8. Click **Print.** You'll see a printer report destination window. Choose your printer and any other preferences, then click **OK.**
9. A warning screen will remind you to insert the appropriate number of Certified Mail labels into your printer. Do this, then click **OK.**

Design Labels

ProDoc has several common label definitions pre-defined for you to choose from. However, if you want to create a custom label definition, the easy to use interface is here. From the **Main Menu,** click **Tools → Design Labels.** A window appears, similar to Figure 3-52.



You may create, update or delete label definitions from this window. The label definitions you create control the size and type of labels you use.

Design options include label type, paper type (height and width), type of printer used, label height and width, margins, and offset dimensions.

Figure 3-52, Available Label Definitions Window

If you click the **Label Name** tab, a list of all label definitions displays. If you click the **Dot Matrix** tab, only label definitions for dot matrix printers will display. If you click the **Laser** tab, only label definitions for laser printers will display.

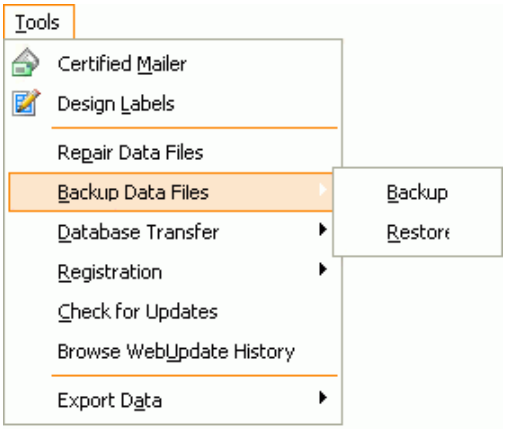
To create a new label definition, click **New**. The **Adding a label definition** window appears. Provide the requested information. You may update a label definition by highlighting it, clicking the **Update** button and making the changes you desire. To delete a label definition, highlight it and click **Delete**.

Repair Data Files

The **Repair Data Files** utility lets you attempt to repair a data file which has somehow been damaged.

CAUTION: Under normal circumstances you will not have occasion to use this utility. It has been included to facilitate repair of data files with direct assistance from one of our Customer Support staff. Accordingly, before using this utility, we recommend that you first call (800) 759-5418 and ask to speak with one of our Support Technicians who will help guide you through the process.

Backup Data Files



Selecting this option will reveal another drop down box with two options, **Backup** and **Restore**, as shown in Figure 3-53.

These are used to manually backup your data files or restore your data files from a previous backup location.

Figure 3-53, Backup Data Files Menu

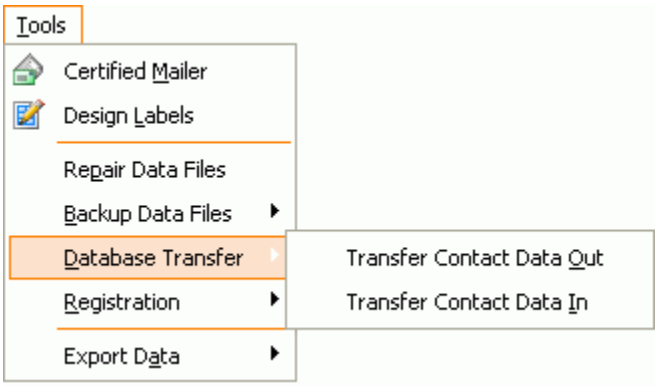
- If you select the **Backup** option, ProDoc makes a backup copy of client and case information

files to the location you specify on the window that appears. This location can be a floppy disk, a directory on a standard hard drive or a network location.

- Similarly, in the event of system failure, file corruption or other reasons, you may elect to click **Restore** from the main screen menu to restore the client and case information backup file back to the ProDoc home directory. In this case, this window should reflect a **Backup from** location which is usually the same floppy disk or hard drive you previously backed up to.

NOTE: The **Backup** and **Restore** menu options are disabled while other ProDoc tasks that use the case information files are running.

Database Transfer



Selecting this option reveals two choices, **Transfer Contact Data Out** and **Transfer Contact Data In,** as shown in Figure 3-54. When you choose either option, a window appears where you select the drive and directory for each transfer in the backup files dialog window. You can transfer data out to, or in from, any file location or drive available to your computer.

Figure 3-54, Database Transfer Menu

After you make this selection, you can select one or more contacts whose data you wish to transfer.

Registration Menu

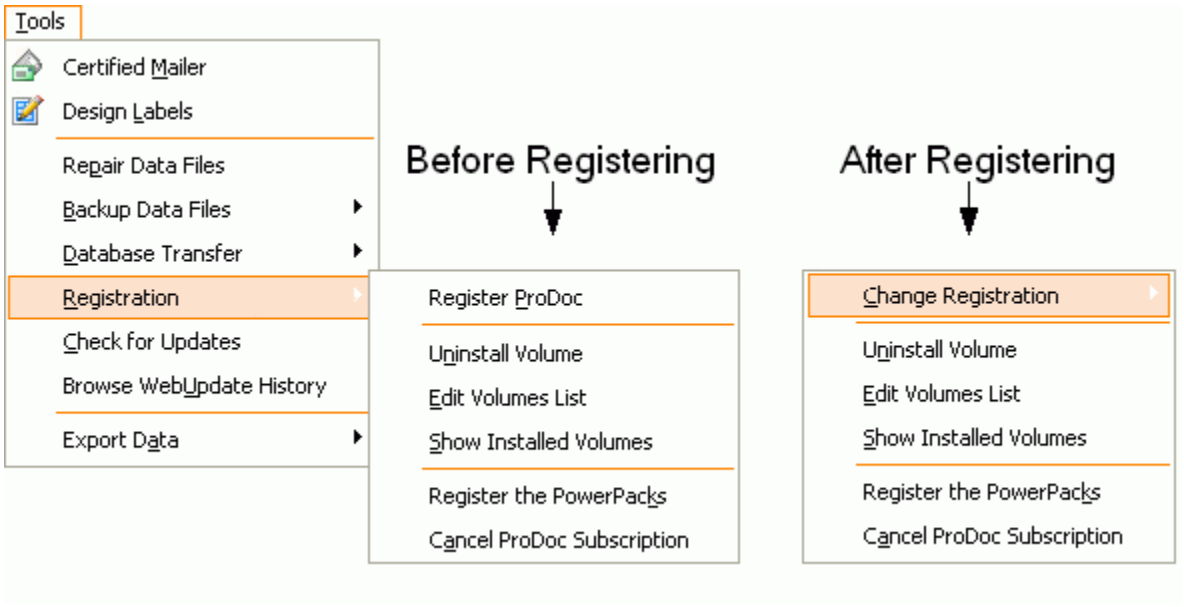


Figure 3-55, Registration Menu and Sub-menus

(If available) Figure 3-55 displays the Registration menu selection and sub-menus which let you manage all licensing and registration for ProDoc, including volumes and PowerPacks. **After ProDoc is registered, Register ProDoc is replaced by Change Registration and Change Firm Name**

choices as shown on the right side of Figure 3-55.

Register ProDoc

Normally you will only need to register the computer one time when you initially install the software. Subsequent periodic updates will automatically extend the period of your registration. Click **here** 11 to jump back to Chapter 1 and read the section on registration.

Change Registration

You can use this option if you need to change your ProDoc license information or need to enter a new registration code. Click **Tools →Registration → Change Registration.** The **Change Registration Code** window appears. Before you change any information, please call us at 1-800-759-5418. Our Technical Support representative will help you complete the window and take any other necessary steps to change your registration.

If there is ever a problem with your registration code, this selection allows you to change your registration code or enter a new registration code, then go through the registration process again.

Change Firm Name

(If available)
To change your firm name, click Tools → Registration → Change Firm Name. This selection allows you to change your firm name and your account and contact information. There are two selections on this submenu, Change by Internet and Change by Phone. If you have an Internet connection, it's best to use the Change by Internet selection.

- **Selecting Change by Internet brings up an internet log in screen. You will need your customer number (located on your invoice, shipping advice or billing statement) and your web password, which was provided to you after you registered. Simply log in and update your information.**
- **Selecting Change by Phone brings up a window listing details about your computer and ProDoc installation and your Firm Name. You can edit your firm name in the New Firm Name field. You will then need to call us at 1-800-759-5418 to obtain and enter the Thomson Reuters Supplied Confirmation Code. Enter it and click the Change Firm Name button to make the firm name change. The technician you speak with will help you complete any other necessary actions.**
- **If you decide not to make any changes, click the Return to ProDoc button.**

Uninstalling Volumes

The **Uninstall Volume** menu selection allows you to uninstall volumes that you no longer use. Before uninstalling a volume, please read the information that follows.

More Information on Volume Registration. ProDoc volumes are updated regularly to provide our customers with forms that reflect the most current laws. It is important to update ProDoc and delete your superseded volumes so you are using forms that represent the current state of the law.

ProDoc provides an expiration date for each of its volumes. It is the expiration date that helps keep attorneys and their staff up-to-date with the most current laws and forms. If you try to access ProDoc after a volume's expiration date, a window entitled Inaccessible Volumes appears, similar to Figure 3-56, warning that the volume's registration has expired and the volumes listed are no longer accessible.

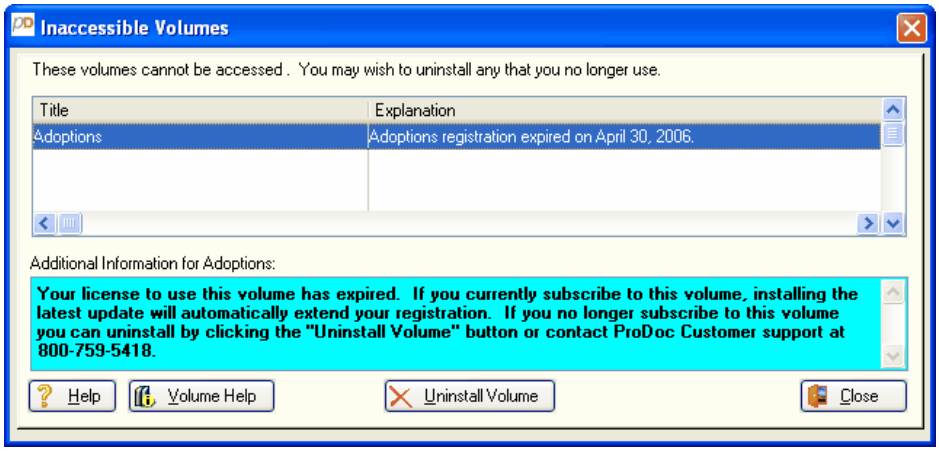

Inaccessible Volumes
These volumes cannot be accessed . You may wish to uninstall any that you no longer use.
Title
Explanation
Adoptions
Adoptions registration expired on April 30, 2006.
Additional Information for Adoptions:
Your license to use this volume has expired. If you currently subscribe to this volume, installing the latest update will automatically extend your registration. If you no longer subscribe to this volume you can uninstall by clicking the "Uninstall Volume" button or contact ProDoc Customer support at 800-759-5418.
Help
Volume Help
Uninstall Volume
Close

Figure 3-56, Inaccessible Volumes Window

In the **Inaccessible Volumes** window, the **Volume Title** and **Explanation** are displayed. **Additional Information** is provided underneath the display window. Click **Help** to view help for the **Inaccessible Volumes** window. If you want to see specific information about each volumes' authors, changes, variances and forms, click **Volume Help**. Click **Uninstall Volume** to uninstall a volume. ProDoc will display the **Volume Uninstall** message box. The message provides you with two options; **Hide Volume Only – No files are deleted** and **Permanently Delete Files and Hide Volume**. These options are discussed in detail below.

Hide Volumes Only – No files are deleted

If you choose Hide Volumes Only – No files are deleted, the volume that you choose to hide will no longer show up on the list of volumes from which you can choose. The volume will remain on your hard drive. This allows you to move any modified master forms or supplemental forms you may have created into the new volume before deleting the prior version of the volume. If you want to continue using a volume that you have hidden, call Thomson Reuters Customer Support at 800-759-5418.

Permanently Delete Files and Hide Volumes

If you choose Permanently Delete Files and Hide Volumes, the files will be deleted from the ProDoc directory on your hard drive and the volume will be removed from the list of volumes. If you decide later that you want to use the expired volume, call Thomson Reuters Customer Support at 800-759-5418.

Solutions for Expired Volumes:

- Usually the only action you need to take is to install the latest available **WebUpdate.** If this is the case, on the main menu, click **Tools → Check for Updates** and install all new updates. The message will discontinue.
- If you have already installed all available updates, you should call Thomson Reuters Customer Support at 800-759-5418.
- If you do not install the update and the volume expires, you will need to call Customer Support and have a new registration issued for the expired volumes.
- Install the latest CD using the registration code licensed for your volumes. If you cannot locate the CD, call Thomson Reuters Customer Support at 800-759-5418.

Ended your subscription. If you no longer subscribe to a volume, you will not be able to access the volume and you will not receive the updated volume for that area of law.

Solutions:

- Call Sales at 800-759-5418 and add the expired volume to your subscription.
- Delete the unregistered volume(s).

Supplemental Forms Use. If you created supplemental forms in the expired volume, they will become

inaccessible once the volume they were created in becomes unregistered or is deleted. You may subscribe to the volume and renew the volume's registration or move the supplemental forms into the new volume.

> **Solution:** Call Customer Support at 800-759-5418 and request assistance with renewing your volume's registration or moving your supplemental forms into the new volume.

Why keep a superseded volume?

We are constantly updating our volumes to provide you with the most current styles and laws. Usually, the new updates affect only a portion of a particular volume. However, when substantial changes have been made in an area of law, we create a new volume to replace the outdated volume. When an outdated volume is replaced, it is superseded. If you have current cases that were created in the superseded volume, you will want to keep the superseded volume active until you have completed those cases. You should keep a superseded volume active while ongoing cases are active. This prevents the need to input the answers to questions that you have already answered once. Use the new volume for any cases you receive after installing the new volume. Once you have completed the cases that used the superseded volume, you may delete the superseded volume. You may use the new volume for your older cases, but you will have to answer all of the questions again.

You may also want to keep a superseded volume in which there are modified master forms or supplemental forms. Keeping the volume will provide you the means to move the modified master forms and supplemental forms into the new volume.

Solution: Call Thomson Reuters Customer Support at 800-759-5418 and request a Vlicense to extend the expiration date for the superseded volume (a Vlicense is Thomson Reuters' license for each volume).

Edit Volumes List

This menu selection is used to add a volume or change the way a volume appears on the volume selection window. It also tells ProDoc where the volume is located. The required information includes the following:

Title - Title of the volume as you want it displayed on the selection window, for example, Family Law.

Subdirectory - Name of the directory where the volume is installed. Do not enter the full path for the directory, since ProDoc assumes the subdirectory entered here is a subdirectory directly beneath the ProDoc home directory. For example, if ProDoc is installed in the directory C:\PRODOC and if you enter FAM as the subdirectory here, ProDoc will look for the volume in C:\PRODOC\FAM. If you are adding a volume, ProDoc will create the directory as described above.

When you select the **Edit Volume List** utility, the Volume Browse window will appear. It displays the volumes list and has **New, Change** and **Delete** buttons. To add a volume to the list, select **New**. The Volume Information window will appear, similar to Figure 3-57.

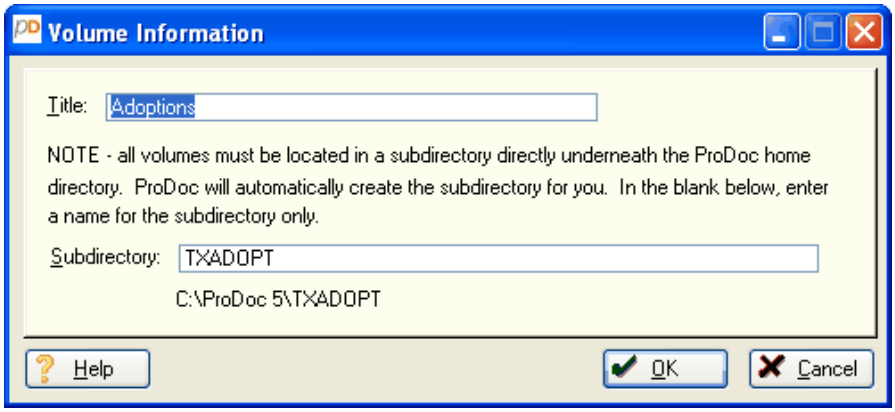

Volume Information
Title:
Adoptions
NOTE - all volumes must be located in a subdirectory directly underneath the ProDoc home directory. ProDoc will automatically create the subdirectory for you. In the blank below, enter a name for the subdirectory only.
Subdirectory:
TXADOPT
C:\ProDoc 5\TXADOPT
Help
OK
Cancel

Figure 3-57, Volume Information Window

The same window will appear if you select **Change** to change the title or subdirectory of the highlighted

volume. The window contains two entry fields:

Title — Title of the volume as you wish it to appear in browse and selection windows, e.g. "Family Law."

Subdirectory — Subdirectory where volume files are stored. This must be a subdirectory under the main ProDoc directory (normally C:\PRODOC). If you enter an incorrect subdirectory, ProDoc will not be able to find the volume files and you will not be able to access the volume until this subdirectory is changed to the subdirectory where the volume files are stored.

To delete a volume from the volumes list, highlight the volume desired and click the **Delete** button. You will be prompted to confirm the deletion, and the volume will be removed from the list. You will no longer be able to access the deleted volume even though deleting the volume from the volumes list doesn't delete any volume files. WARNING – if you delete a ProDoc volume from the list and later want to add it back, you should install the volume rather than merely adding it back to the volumes list.

Show Installed Volumes

Selecting **Show Installed Volumes** displays a browse list of all of the volumes you have installed. You may need to refer to this list while getting help from technical support. You can click the **Info** button to see a listing of the current changes from the last update, any variances, the authors of the forms, and a list of forms for each volume.

Register the PowerPacks

This menu option will only be available to those customers who subscribe to the PowerPacks—Additional Timesavers.

If your PowerPack registration expires while your subscription is current, you should call Technical Support at (800) 759-5418. The technician that you speak with will take you through a number of steps that must be completed before you can re-register the PowerPack.

To register a PowerPack:

1. Call Thomson Reuters Technical Support at (800) 759-5418.
2. On the ProDoc toolbar click **Tools → Registration → Register the PowerPacks**.
3. The **Registration Information for PowerPack** window appears.
4. Give the support technician the **Validation seed** that appears in the upper left side of the **Registration Information for PowerPack** window.
5. Make sure that **Today's date** is correct.
6. The technician will tell you the **Registration type**, **Expiration date**, **Validation Code** and which **PowerPack(s)** to choose. To choose a **PowerPack**:
   a. In the **PowerPack** section of the **Registration information for PowerPack** window highlight the PowerPack you are registering by clicking on it. If only one PowerPack is displayed in the PowerPack section it is always highlighted.
   b. Click to the left of the highlighted PowerPack and a green check mark appears. You may also click the **Select** button to place a green check mark next to the highlighted PowerPack.
   c. If you need to register all listed PowerPacks, click the **Select All** button to select all the PowerPacks in the list. Click the **Clear All** button to clear all selections.
7. Click **OK.** This button is disabled if no PowerPacks are selected.

To permanently un-register one or more installed PowerPacks, select the desired PowerPacks and click the **Permanently Unregister PowerPack** button. This button is disabled if no PowerPacks are selected. Click **Yes** when the **Unregister the PowerPack** window appears and the selected PowerPack (s) will be permanently unregistered.

To take no action, click the **Cancel** button to close the window.

Check for Updates

To run **WebUpdate,** click **Tools → Check for Updates.** The program will check Thomson Reuters' online server for updates needed for your installation. If updates are available, the **Updates for ProDoc are now available** window appears. You have three choices on this window:

- Click **Download and Apply All Updates** to download all updates. The updates will be downloaded, and a window will be displayed which tells you the updates have been downloaded. You will be prompted to restart ProDoc to install the updates. After ProDoc restarts, the downloaded updates will be installed.
- Click **Select Updates to Download and Apply** to open a window displaying available updates and a description of each update available. The selection box for each update will be checked. We recommend you download each available update. If you want to exclude an update from download, click the update's check box to clear it, and the update will not be downloaded. Click **Begin Download** to download the selected updates. If you don't want to download updates at this time, click **Cancel.**
- Click **Do Not Download Updates at this Time** to close the update window without downloading any updates.

ProDoc WebUpdate Window

This window displays available updates and a description of each update available. The selection box for each update will be checked. We recommend you download each available update. If you want to exclude an update from download, click the update's check box to clear it, and the update will not be downloaded. Click **Begin Download** to download the selected updates. If you don't want to download updates at this time, click **Cancel**.

Browse WebUpdate History

To check your update history, Click **Tools → Browse WebUpdate History**. The **Browse WebUpdate History** window will appear. This window displays a history of all updates you've downloaded. If you want to see updates that you have **not** downloaded, uncheck the box labeled **Display only downloaded updates**. Click **Close** to close the window.

Cancel ProDoc Subscription

This menu choice provides you the means to notify us that you wish to cancel your subscription. The window that appears provides us with the information needed to complete your request. It also provides fields where you can tell us your reasons for cancelling and any suggestions you may have for us. We value your feedback, and this information will help us improve the services we provide. When completed, this window generates an email which is sent to us so we can process your request.

Export Data Menu

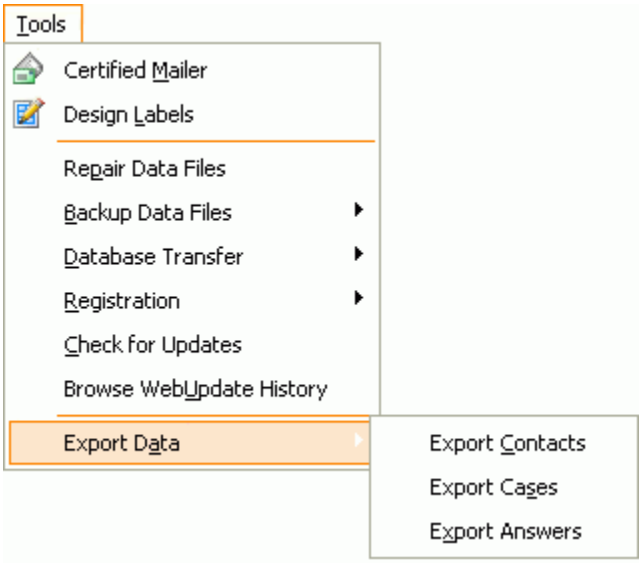


Figure 3-58, Export Menu Choices

The Export Data menu choices are shown in Figure 3-58.

You can use this menu selection to export contact information, case information, and answers.

The data is exported to a comma-delimited ASCII file.

To export data from the three categories, you first select the appropriate contacts or cases, then you must select the fields you wish to export. Selecting **Export Contacts** brings up the **Select Contacts** window, while selecting **Export Cases** and **Export Answers** brings up the **Select Cases** window. Figures 3-59 and 3-60 depict these windows. The basic process for selecting the contact or case is the same for exporting contacts or exporting cases.

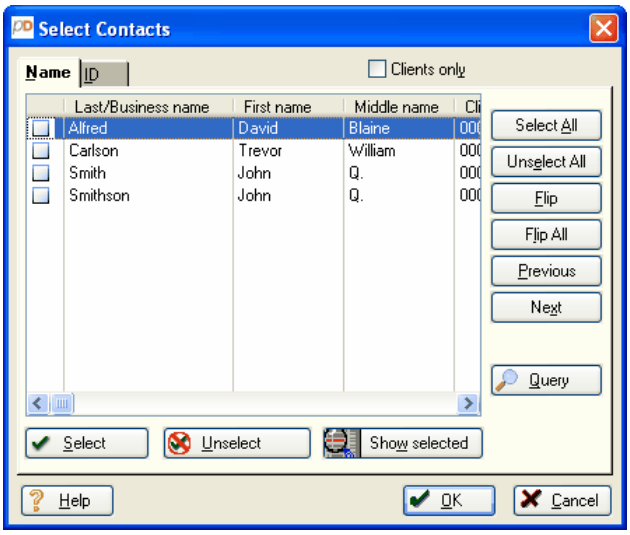
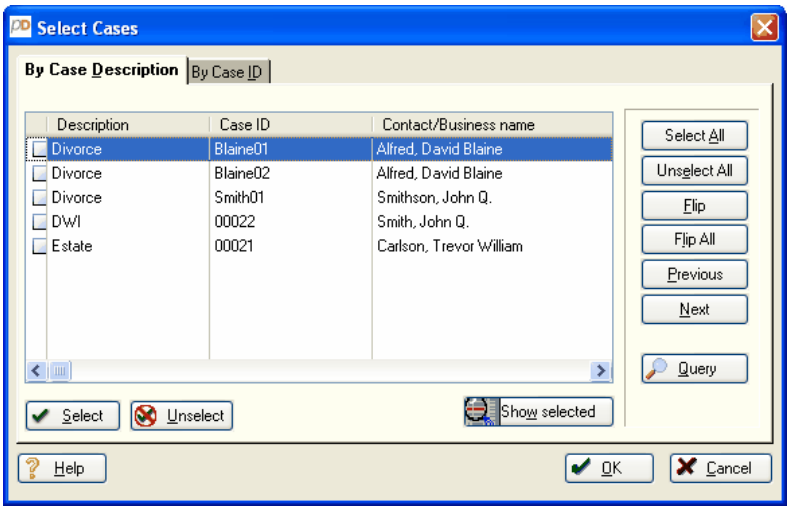


Figure 3-59, Select Contacts Window

When selecting contacts for export, you can display your list by **Name** or by **ID**. If desired, you can click the **Clients Only** box to only display clients.

Use the buttons at the bottom of the window to select or unselect individual contacts and view only those you've selected.

Use the buttons on the right side of the window to quickly change your selections, flip one or all selections, search the database for a particular contact, move the highlight to the previous or next one selected, or perform a query to find those who match selected search criteria.



When selecting cases or case answers for export, you can display your list by **Case Description** or by **Case ID**.

The selections buttons and controls on this window operate in the same manner as those on the Select Clients window.

Figure 3-60, Select Cases Window

After you select the clients or cases as appropriate and click the **OK** button, the Choose Field for Export window appears, similar to Figure 3-61.

Figure 3-61, Choose Fields for Export Window

A list of controls for this window follows:

Add - Highlighting any of the fields that are displayed on the left side of the Choose Fields for Export box and clicking **Add** will place the highlighted field in the Export Fields display on the right side of the box.

Remove - Highlighting any of the fields that are displayed on the right side of the Choose Fields for Export box and clicking **Remove** will remove the highlighted field in the Export Fields display.

Shift Up - Moves the highlighted field up in the list of fields to export.

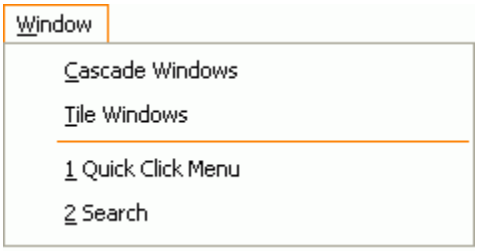
Shift Down - Moves the highlighted field down in the list of fields to export.

Picture - Allows you to set the format in which your numbers are exported. Example: @n6.2 means that the numbers that you export will be exported as six numbers, a decimal point and two numbers following the decimal point.

When you are finished choosing fields, click the **OK** button. A browse/save directory window will appear,

where you will enter the file name and locate the folder in which to save the file.

Window Menu



The **Window** menu, depicted in Figure 3-62, shows you what windows you currently have opened and allows you to display the windows in different ways on the screen. You can also use the numbered list of open windows to choose which one to work with.

Figure 3-62, Window Menu Choices

Help Menu

The **Help** Menu displays options for getting help. The menu is depicted in Figure 3-63.

Figure 3-63, Help Menu

Context Sensitive allows you to get help on the particular task you're working on.

Contents displays the Help library.

Search for Help on... allows you to use search for and find help topics.

How to use Help explains the help system used in ProDoc.

About ProDoc lists version, license and subscription information.

About the Volumes lets you access the list of the latest updates installed. This information includes a description of the current changes from the last update, any variances, the authors of the forms, and a list of forms for each volume.

Visit ProDoc Website opens the ProDoc Web site in a browser window.

Send an Email to ProDoc opens an Outlook message addressed to ProDoc. This message will automatically contain version, installation and firm information. This information will help Thomson Reuters' Customer Service technicians handle your issue efficiently.

Introduction to California PowerPacks

What are PowerPacks?

PowerPacks are collections of powerful tools that allow fast and efficient entry of information for document assembly and information management. Using PowerPack programs significantly reduces the amount of time it takes to assemble documents. The following PowerPacks are currently available for subscription in California:

California Probate PowerPack. This PowerPack features the **Inventory & Appraisal** 91. This program provides you the tools needed to quickly produce estate inventories for your probate matters. It completely eliminates manual calculations, simplifies your work and dramatically reduces the time necessary to handle probate matters.

California Family Law PowerPack. This PowerPack features two programs:

- **Property Declaration & Distribution** 109 - This program helps you inventory combined property, identify the property awarded to each party and create multiple scenarios to explore different ways to split the combined property.
- **Family Law - UCCJEA Declaration** 129 - The Family Law UCCJEA (Uniform Child Custody Jurisdiction and Enforcement Act) Declaration program is designed to assist you with entering the current address of each minor child as well as the five year residential history of each child. As a part of the declaration, you can enter additional information regarding ancillary matters which affect the children. Finally, you can also list all third parties claiming visitation and/or custody rights to the children.

California Guardianship PowerPack. This PowerPack features three programs:

- **Guardianship Inventory & Appraisal** 141 - This program provides you the tools needed to quickly produce inventories for your guardianship matters.
- **Guardianship - UCCJEA Declaration** 162 - The Guardianship UCCJEA (Uniform Child Custody Jurisdiction and Enforcement Act) Declaration program is designed to assist you with entering the current address of each minor child as well as the five year residential history of each child. As a part of the declaration, you can enter additional information regarding ancillary matters which affect the children. Finally, you can also list all third parties claiming visitation and/or custody rights to the children.
- **Guardianship Accounting** 174 - This program makes it easy to produce a guardianship accounting with no manual calculations. You only need to list the information once. The program lists the transactions that have occurred during the accounting period and lists the assets that remain on hand at the end of the reporting period.It consists of a Summary sheet and Schedule A showing all Receipts, Schedule B showing all gains on sale of property, Schedule C showing all Disbursements, Schedule D showing all losses on sales of property, and Schedule E showing cash assets on hand at the end of the accounting period.

California Conservatorship PowerPack. This PowerPack features two programs:

- **Conservatorship Inventory & Appraisal** 208 - This program provides you the tools to quickly produce inventories for your conservatorship matters.
- **Conservatorship Accounting** 228 - This program makes it easy to produce a conservatorship accounting with no manual calculations. You only need to list the information once. The program lists the transactions that have occurred during the accounting period and lists the assets that remain on hand at the end of the reporting period.It consists of a Summary sheet and Schedule A showing all Receipts, Schedule B showing all gains on sale of property, Schedule C showing all Disbursements, Schedule D showing all losses on sales of

property, and Schedule E showing cash assets on hand at the end of the accounting period.

How Can I Locate the PowerPacks?

On the ProDoc menubar, click **PowerPacks**.

- If you subscribe to the California Probate Volume and PowerPack, you should see the **Probate** menu choice. Click **Probate** to display the **Inventory & Appraisal** program choice.
- If you subscribe to the California Family Law Volume and PowerPack, you should see the **Family Law** menu choice. Click **Family Law** to display the **Property Declaration & Distribution** and **UCCJEA Declaration** program choices.
- If you subscribe to the California Guardianship PowerPack, you should see the **Guardianship** menu choice. Click **Guardianship** to display the **Guardianship Inventory and Appraisal**, **Accounting, and Guardianship - UCCJEA Declaration** program choices.
- If you subscribe to the California Conservatorship PowerPack, you should see the **Conservatorship** menu choice. Click **Conservatorship** to display the **Conservatorship Inventory and Appraisal** and **Conservatorship Accounting** program choices.

How Do I Get the PowerPacks If I Don't Already Subscribe?

If your subscription does not currently include a PowerPack you need, call ProDoc Sales at 800-759-5418 to add it to your subscription. Get the power today!

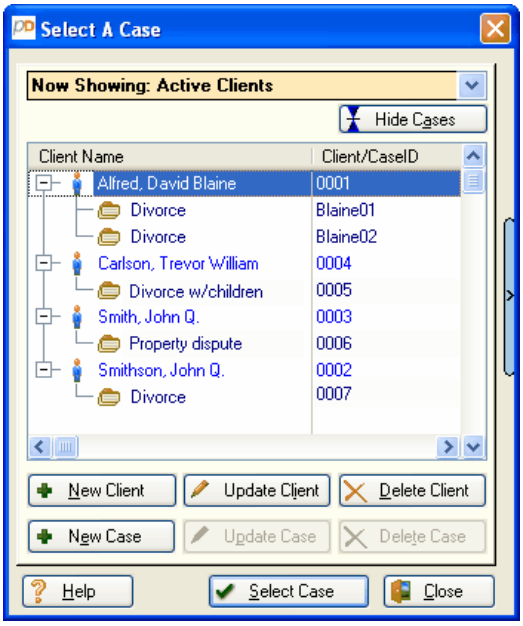
How Do I Use PowerPack Tools?

If you would like further instructions on using PowerPacks, consult this manual, click the **Help** buttons that appear in the PowerPack program you are using or call Technical Support at 800-759-5418. Support included at no extra charge includes:

- **Help** buttons on each window (or press the **F1** key).
- Computer Based Training (CBT) Modules at the **ProDoc Web site.**
- Periodic ProDoc user seminars; schedule these through the **ProDoc Web site.**
- Call our Technical Support specialists at 1-800-759-5418.
- Send email to **tech@prodoc.com.**

Selecting a Case for PowerPack Use

This section discusses selecting an **existing** client and case. If you need to create a **new** client and case, click the **New Client** button to create the client. After creating the client, highlight the new client's name and click the **New Case** button to create a new case for the client. For help, click the **Help** buttons on the windows used or click **here** 33 to see the section on adding new clients.



Select a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input into your PowerPack program. It lists existing ProDoc clients and all cases for the clients. You can also use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click a displayed case, then press the **Enter** key or click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients.** Other choices are **All Contacts, Closed Contacts, Private Clients** and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

California Inventory & Appraisal

Getting Started

It's easy to create estate inventories for your probate matters with the **Inventory & Appraisal** program. This program completely eliminates manual calculations, simplifies your work and dramatically reduces the time necessary to handle probate matters.

You need to only list the necessary information once. ProDoc automatically calculates the value of the estate and prints the required form and attachments.

Starting the Program

1. Click **PowerPacks → Probate → Inventory & Appraisal.**
2. The **Select a Case** 107 window opens. Select a case by double-clicking a visible case title. You can also click the title once, then press the **Enter** key or click the **Select** button. Click the **Help** button on the window or click **here** 107 for detailed help for finding and selecting cases.
3. The **Inventory & Appraisal** program opens to the **General** tab.

Navigating the Inventory & Appraisal Program

There are five tabs across the top of the main program window: **General** 92, **Community Property** 94, **Separate Property** 96, **View Attachment 1** 98 and **View Attachment 2** 99. Each tab represents a different form. To move from one screen to another, position the cursor over the tab you want to use and click on it.

You can also use hot keys. Wherever a window, screen or field title shows an underlined character, i.e., "**Primary Attorney**", you can navigate to that entry by holding the "**Alt**" key and pressing the underlined keyboard character. In the earlier example, pressing **Alt + A** on your keyboard puts your cursor in the **Primary Attorney** field.

General Form

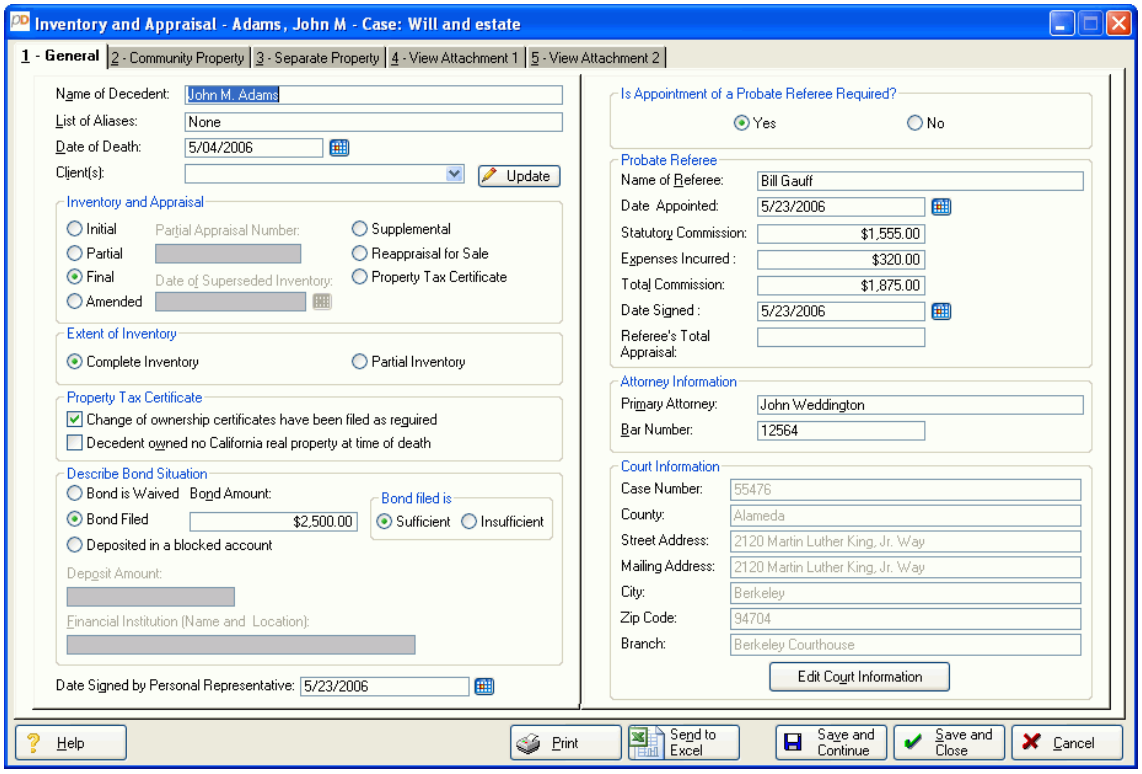


Figure 2, General Form

The **General** form is used to enter all basic information about the decedent and estate except for the listing of assets.

Navigating through the General form

To navigate from one field/button to another, click on the field, radio button or button you would like to use. You can also press the **Tab** key on your keyboard to move forward to the next entry and press **Shift + Tab** to move to the previous entry.

Completing the General form

Descriptions of entry fields and choices required for this form are listed below.

Name of Decedent - Enter the decedent's name.

List of Aliases - Enter any other names by which the decedent may be known.

Date of Death - Enter the date of death in mm/dd/yyyy format. You can also click the calendar icon to select the date from a calendar tool. Click **Select a Date** 108 for detailed help with this tool.

Client(s) - Click the drop-down arrow field to select the client(s) for this case. To edit the client(s) list for the case, click the **Update** button. The **Client Names** window will appear, where you can add, update or delete clients. If you click the **New** or **Update** buttons on that window, a window will appear to help you **add or edit the client name.** The option to update a client's name will not be available if the client is in your ProDoc database; you must use the Client/Case Manager for this. For specific help for these windows, click the **Help** button on each window.

Inventory and Appraisal Section - Click the appropriate radio button to indicate the type of inventory

you are creating. If you select **Partial,** the **Partial Appraisal Number** field is activated. Enter a numeral representing the serial number of the appraisal (i.e. "1", "2"). If you select **Amended,** the **Date of Superseded Inventory** field is activated. Enter the date of the superseded inventory.

Extent of Inventory Section - Click the appropriate radio button to indicate whether the inventory is complete or partial.

Property Tax Certificate Section - Click the appropriate selection box to indicate whether change of ownership certificates have been filed as required. If the decedent owned no California real property at the time of death, indicate this by clicking the appropriate selection box.

Describe Bond Situation Section - Click the appropriate radio button to describe the bond situation: **Bond is Waived, Bond Filed,** or bond is **Deposited in a Blocked Account.**

- If you choose **Bond Filed**, enter the amount in the **Bond Amount** field and click the appropriate radio button to indicate whether or not the bond amount is sufficient.
- If you choose **Deposited in a Blocked Account**, enter both the **Deposit Amount** and the name and location of the financial institution holding the deposit in the appropriate fields.

Date Signed by Personal Representative - Enter the date the Inventory & Appraisal was signed by the decedent's personal representative in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** calendar tool.

Is Appointment of a Probate Referee Required? Section - Click the appropriate **Yes** or **No** radio button.

Probate Referee Section - Enter the requested information for the **Probate Referee** if one is required.

- For date fields, enter the date in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** calendar tool.
- Enter the amount provided by the Probate Referee for the total of Attachment 2 property in the **Referee's Total Appraisal** field. The amount you enter here will be printed in the applicable field on the DE-160 form. If the amount entered differs from the amount calculated from your asset entries, you will be notified when you print the form.

Attorney Information Section - Enter the **Primary Attorney's** name and **Bar Number** in the fields provided.

Court Information Section - Click the **Edit Court Information** button to open the **Court Information** window. Enter the **Case Number** and choose the **County** and **Branch.** The **Street Address, Mailing Address, City** and **Zip Code** should be automatically completed for you depending upon your previous selections. If not, enter the information in the fields provided. Click the **Save** button when you are finished to return to the **General** form.

When you are finished entering the information on the **General** form, click the **Save and Continue** button to save your entries and continue working, or click the **Save and Close** button to save your entries and close the **Inventory & Appraisal** program.

Community Property Form

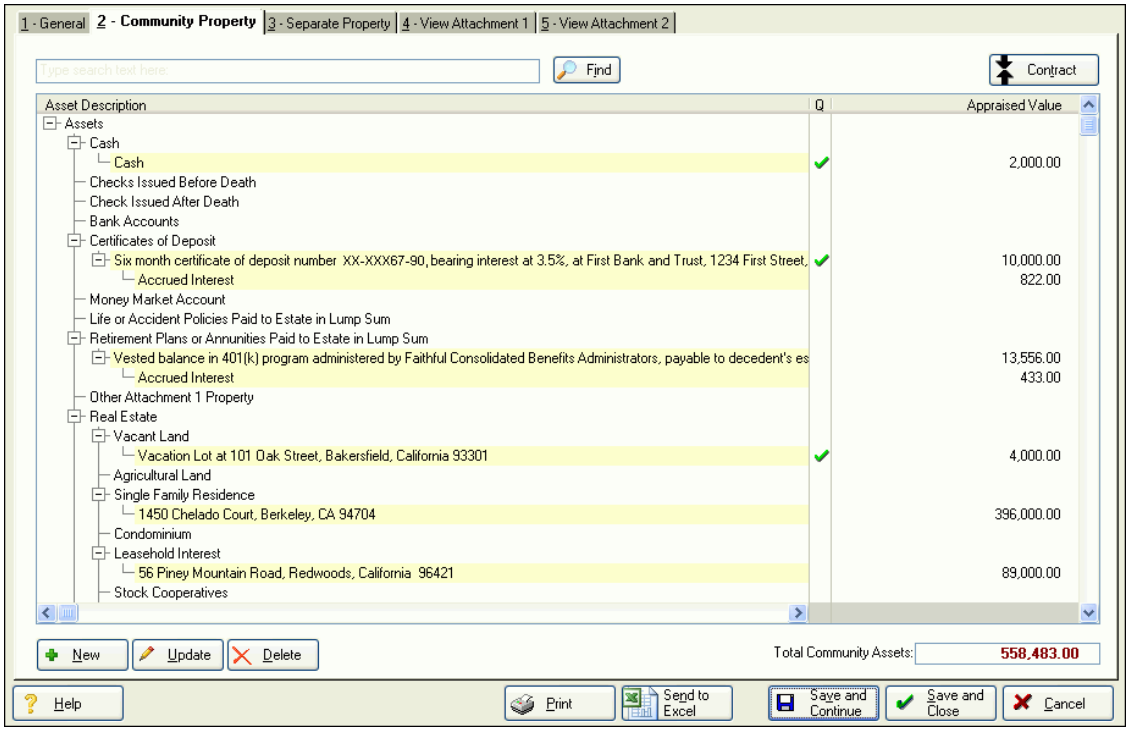


Figure 3, Community Property Form

The **Community Property** form is used to enter details regarding estate community property.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 94
Locating Asset Descriptions 94
Entering Assets 95
Using Toolbar Buttons 95

How Assets are Displayed

The information for each asset or debt is displayed in columns: **Asset Description**, **Q** (Quasi-Community Property, identified by a green check mark), and **Appraised Value.** As you enter assets, a running total is displayed under the listing, labeled **Total Community Assets.**

Entries of actual assets are highlighted in yellow.

To view all asset descriptions, click the **Expand** button in the top right side of the screen. This button serves as both an **Expand** and **Contract** button. To view only the main title, **Assets,** in the **Asset Description** column, click the **Contract** button. You can also click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Ensure the list is fully expanded. Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.

- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

Note: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

This is a general overview of steps for asset entries. For specific help on various types of asset entries, click the **Help** button on each asset entry screen.

1. Double-click an asset description, or click a description once and click **New.**
2. A window will appear titled with the description you chose. It will display the entry fields appropriate for the asset.
3. Complete the displayed fields for the asset. These will vary according to the type of asset you are entering.
4. When you are finished, either click the **Add Another** button to enter another asset in the same category or click the **OK** button to return to the **Community Property** form. The descriptions and amounts will be listed here.
5. You may edit an entry by double-clicking it, or by clicking it and clicking the **Update** button on the toolbar. To delete an entry, highlight it and click the **Delete** button. You can also right-click an asset entry and click the appropriate menu choice: **New, Update** or **Delete.**

Using Toolbar buttons to work with Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information on an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Separate Property Form

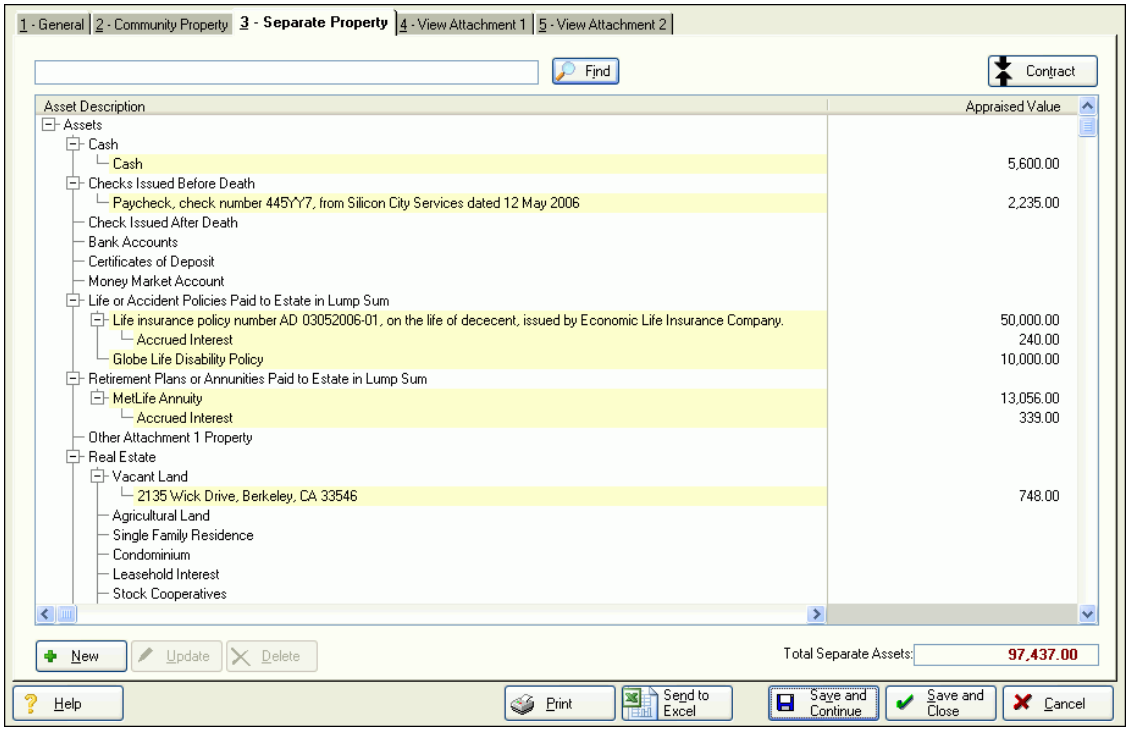


Figure 4, Separate Property Form

The **Separate Property** form allows you to enter details regarding the decedent's separate property and the value of the property.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 96

Locating Asset Descriptions 96

Entering Assets 97

Using Toolbar Buttons 97

How Assets are Displayed

The information for each asset or debt is displayed in columns: **Asset Description** and **Appraised Value**. As you enter assets, a running total is displayed under the listing, labeled **Total Separate Assets.**

Entries of actual assets are highlighted in yellow.

To view all asset descriptions, click the **Expand** button in the top right side of the screen. This button serves as both an **Expand** and **Contract** button. To view only the main title, **Assets,** in the **Asset Description** column, click the **Contract** button. You can also click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Ensure the list is fully expanded. Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will

start again at the first matching description.

- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

Note: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

Note: This is a general overview of steps for asset entries. For specific help on various types of asset entries, click the **Help** button on each asset entry screen.

1. Double-click an asset description, or click a description once and click **New.**
2. A window will appear titled with the description you chose. It will display the entry fields appropriate for the asset.
3. Complete the displayed fields for the asset. These will vary according to the type of asset you are entering.
4. When you are finished, either click the **Add Another** button to enter another asset in the same category or click the **OK** button to return to the **Separate Property** form. The descriptions and amounts will be listed here.
5. You may edit an entry by double-clicking it, or by clicking it and clicking the **Update** button on the toolbar. To delete an entry, highlight it and click the **Delete** button. You can also right-click an asset entry and click the appropriate menu choice: **New, Update** or **Delete.**

Using Toolbar buttons to work with Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information on an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

View Attachment 1 Form

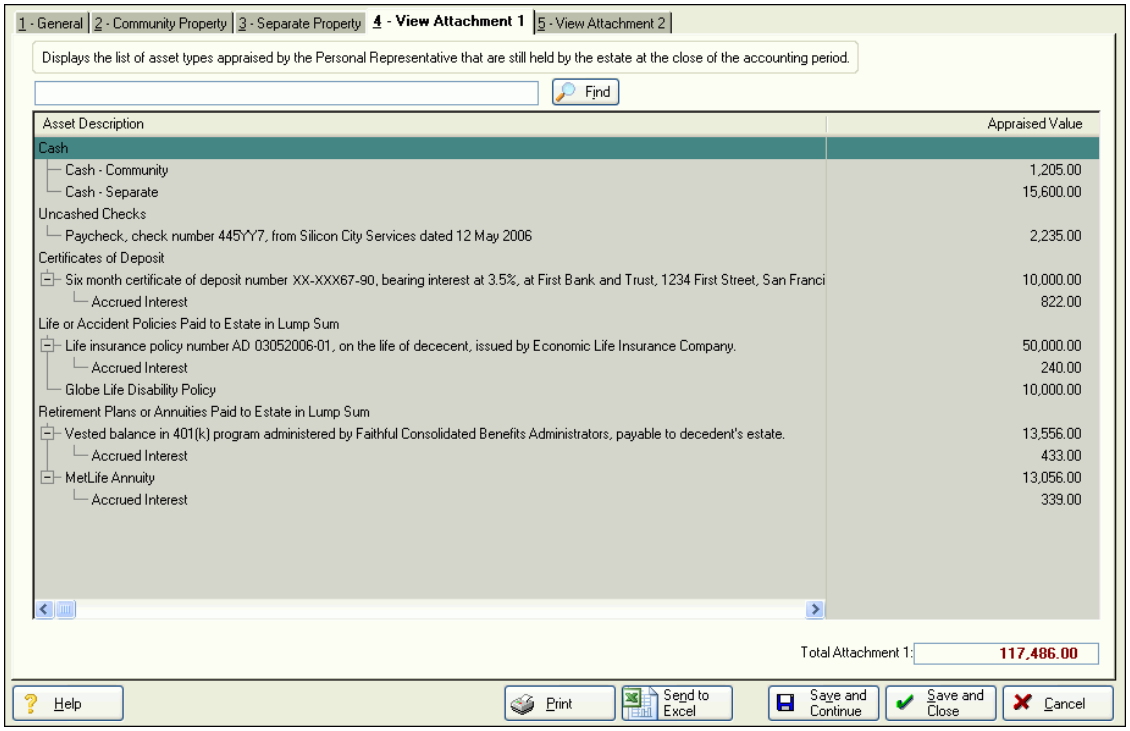

1 - General
2 - Community Property
3 - Separate Property
4 - View Attachment 1
5 - View Attachment 2
Displays the list of asset types appraised by the Personal Representative that are still held by the estate at the close of the accounting period.
Find
Asset Description
Appraised Value
Cash
Cash - Community 1,205.00
Cash - Separate 15,600.00
Uncashed Checks
Paycheck, check number 445YY7, from Silicon City Services dated 12 May 2006 2,235.00
Certificates of Deposit
Six month certificate of deposit number XX-XXX67-90, bearing interest at 3.5%, at First Bank and Trust, 1234 First Street, San Franci 10,000.00
Accrued Interest 822.00
Life or Accident Policies Paid to Estate in Lump Sum
Life insurance policy number AD 03052006-01, on the life of dececent, issued by Economic Life Insurance Company. 50,000.00
Accrued Interest 240.00
Globe Life Disability Policy 10,000.00
Retirement Plans or Annuities Paid to Estate in Lump Sum
Vested balance in 401(k) program administered by Faithful Consolidated Benefits Administrators, payable to decedent's estate. 13,556.00
Accrued Interest 433.00
MetLife Annuity 13,056.00
Accrued Interest 339.00
Total Attachment 1: 117,486.00
Help
Print
Send to Excel
Save and Continue
Save and Close
Cancel

Figure 5, View Attachment 1 Form

This form is completed automatically as you enter assets. It displays asset descriptions, appraised values and the total appraised value for the asset types appraised by the personal representative that are still held by the estate at the close of the accounting period. You cannot edit entries on this form.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list if it is longer than the viewable area.
- Click on the top entry asset entry in the **Asset Description** column and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

View Attachment 2 Form

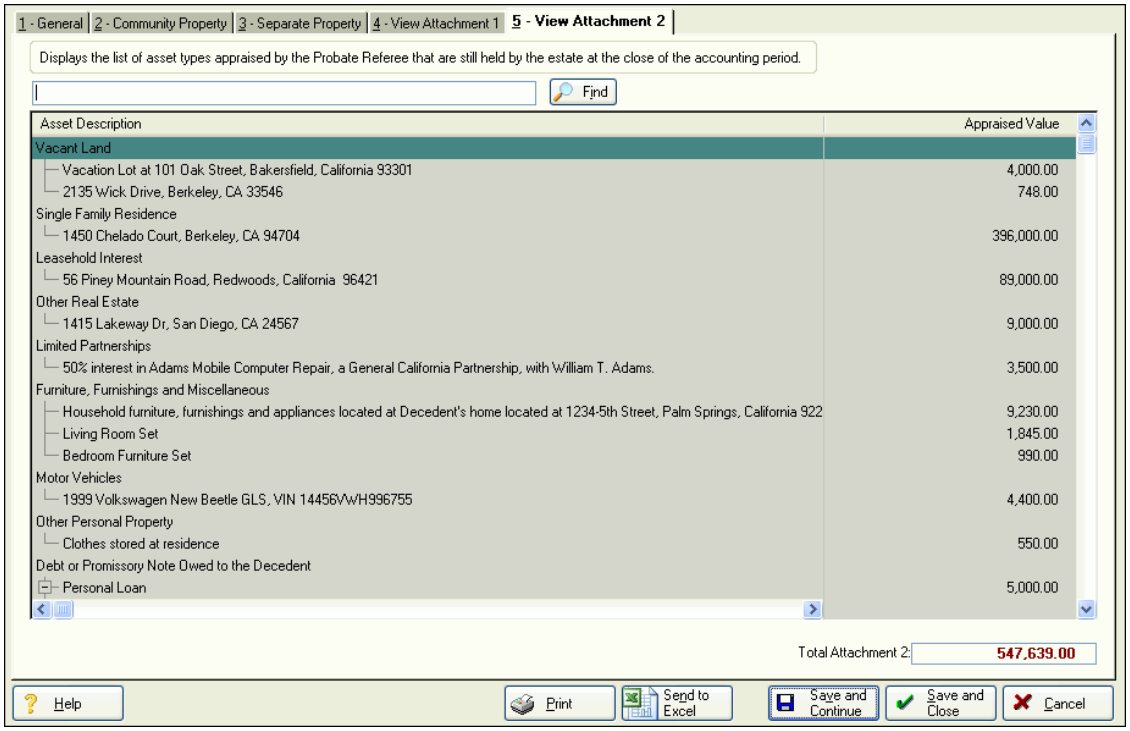

1 - General
2 - Community Property
3 - Separate Property
4 - View Attachment 1
5 - View Attachment 2
Displays the list of asset types appraised by the Probate Referee that are still held by the estate at the close of the accounting period.
Find
Asset Description
Appraised Value
Vacant Land
Vacation Lot at 101 Oak Street, Bakersfield, California 93301 4,000.00
2135 Wick Drive, Berkeley, CA 33546 748.00
Single Family Residence
1450 Chelado Court, Berkeley, CA 94704 396,000.00
Leasehold Interest
56 Piney Mountain Road, Redwoods, California 96421 89,000.00
Other Real Estate
1415 Lakeway Dr, San Diego, CA 24567 9,000.00
Limited Partnerships
50% interest in Adams Mobile Computer Repair, a General California Partnership, with William T. Adams. 3,500.00
Furniture, Furnishings and Miscellaneous
Household furniture, furnishings and appliances located at Decedent's home located at 1234-5th Street, Palm Springs, California 922 9,230.00
Living Room Set 1,845.00
Bedroom Furniture Set 990.00
Motor Vehicles
1999 Volkswagen New Beetle GLS, VIN 14456VWH996755 4,400.00
Other Personal Property
Clothes stored at residence 550.00
Debt or Promissory Note Owed to the Decedent
Personal Loan 5,000.00
Total Attachment 2: 547,639.00
Help
Print
Send to Excel
Save and Continue
Save and Close
Cancel

Figure 6, View Attachment 2 Form

This form is completed automatically as you enter assets. It displays asset descriptions, appraised values and the total appraised value for the asset types appraised by the Probate Referee that are still held by the estate at the close of the accounting period. You cannot edit entries on this form.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list if it is longer than the viewable area.
- Click on the top entry asset entry in the **Asset Description** column and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Asset Description Categories

Attachment 1 Property Overview

Asset description categories which qualify as **Attachment 1 Property** are shown below. Since the entry fields vary considerably across these asset windows, please click the **Help** button on each asset window for detailed help with entering information for the asset.

Cash
Check Issued Before Death
Check Issued After Death
Bank Accounts
Certificates of Deposit
Money Market Account
Life or Accident Policies Paid to Estate in Lump Sum
Retirement Plans or Annuities Paid to Estate in Lump Sum
Other Attachment 1 Property

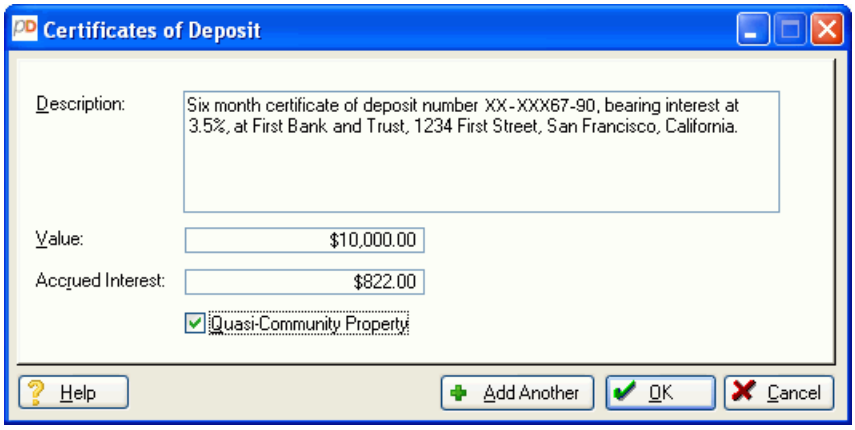


Figure 7, Example Attachment 1 Property Entries

Button Descriptions and Functions

Help - Click this button to see help on completing specific asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Real Estate Overview

Asset description categories in the **Real Estate** listing are shown below. Click **Entering Asset Information** 101 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Vacant Land
Agricultural Land
Single Family Residence
Condominium
Leasehold Interest

Stock Cooperatives
Residential Income Producing Property
Commercial or Industrial Property
Life Estate
Remainder and Reversionary Interest
Time Share Interest
Other Real Estate

If a real estate asset doesn't fit into any other category, enter the asset in the **Other Real Estate** category.

Entering Asset Information. Each asset description window opens with two tabs available, the **Asset** tab and the **Property Description** tab.

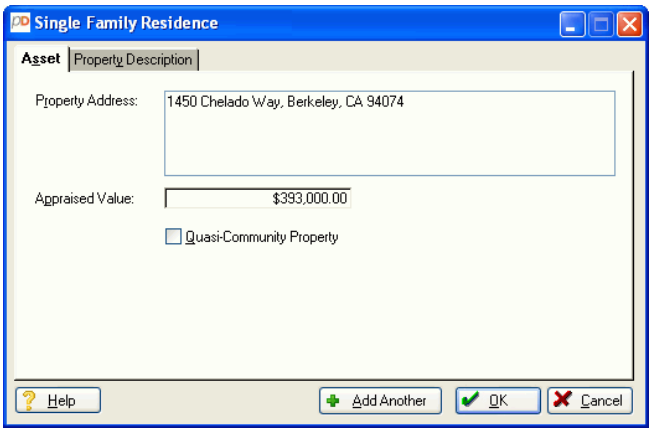


Figure 8, Example Real Estate Asset Tab Entries

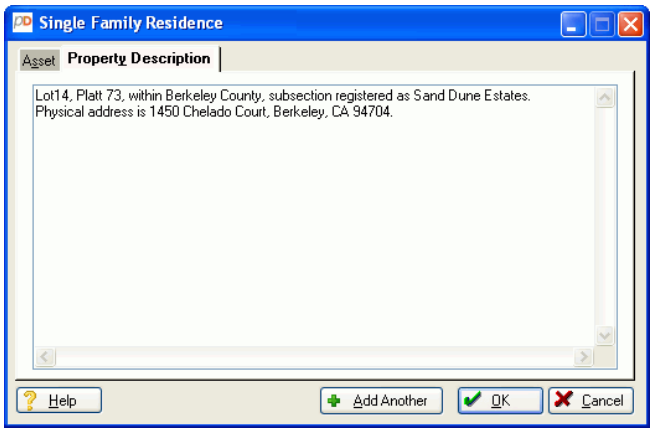


Figure 9, Example Legal Description Tab Entry

The **Asset** tab contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

Property Address - Enter the physical address of the property in line form (i.e., 12 Mockingbird Street, Berkeley, CA 94704).

Appraised Value - Enter the appraised value of the real estate or interest.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the real estate qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

The **Property Description** tab provides you one field to enter. Click the tab and enter the complete legal description of the asset. Click the **Help** button to see a detailed description of the information required for the field.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Real Estate** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Business Interests Overview

Asset description categories in the **Business Interests** listing are shown below. Click **Entering Asset Information** 102 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Closely Held Corporation
Limited Partnerships
General Partnerships
Sole Proprietorships
Limited Liability Companies
Other Business

If a business asset doesn't fit into any other category, enter the asset in the **Other Business** category.

Entering Asset Information

The window used for business interests assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

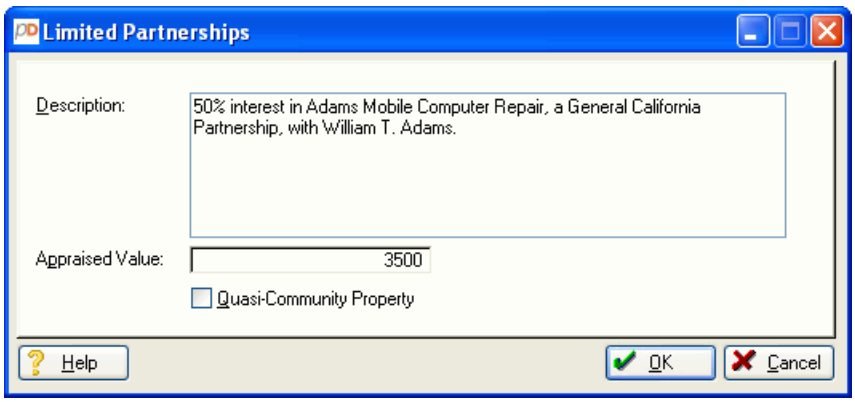


Figure 10, Example Business Interests Asset Entries

Description - Enter a description of the business interest. Click the **Help** button to see a detailed description of required entries for each business interest.

Appraised Value - Enter the appraised value of the business interest.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the business interest qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Business Interests** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Tangible Personal Property Overview

Asset description categories in the **Tangible Personal Property** listing are shown below. Click Entering Asset Information 103 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Furniture, Furnishings and Miscellaneous
Jewelry
Coins or Stamps
Work of Art
Mobile Homes
Motor Vehicles
Boat, Airplane
Livestock and Breeding Animals
Other Personal Property

If a personal property asset doesn't fit into any other category, enter the asset in the **Other Personal Property** category.

Entering Asset Information

The window used for personal property assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

Figure 11, Example Tangible Personal Property Entries

Description - Enter a description of the property. Click the **Help** button to see a detailed description of required entries for each type of property.

Appraised Value - Enter the appraised value of the business interest.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the business interest qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Tangible Personal Property** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Debt or Promissory Notes Owed to the Decedent

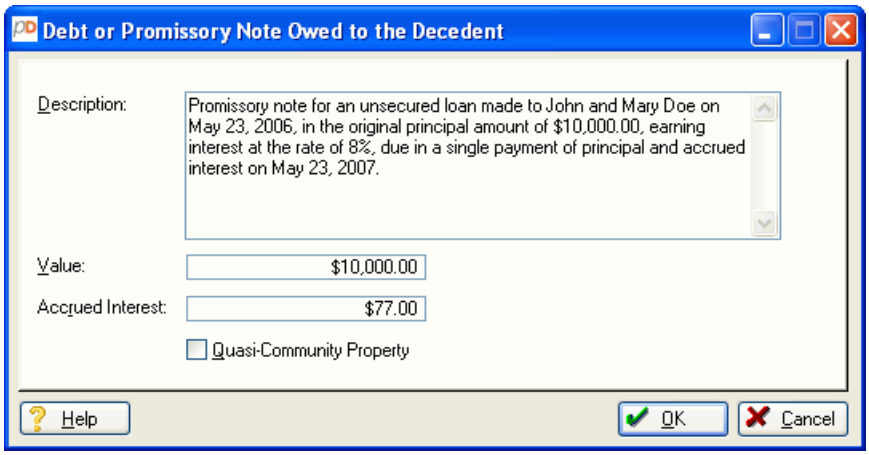

Debt or Promissory Note Owed to the Decedent
Description:
Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original principal amount of $10,000.00, earning interest at the rate of 8%, due in a single payment of principal and accrued interest on May 23, 2007.
Value:
$10,000.00
Accrued Interest:
$77.00
Quasi-Community Property
Help
OK
Cancel

Figure 12, Example Debt or Promissory Notes Owed to Decedent Entries

To enter a debt or promissory note owed to the decedent, or to update existing asset descriptions in this category, follow the steps below:

1. Enter a **Description** in the designated field. Include the terms of the note, such as the date of the debt or note and the final date due, the names of the borrowers, the original amount borrowed, the payment amount and dates of scheduled payments, the interest rate, and any security for the loan. If real property secures the loan, include either the Assessor's Parcel Number or the legal description of the property. Example: "Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original principal amount of $10,000.00, earning interest at the rate of 8%, due in a single payment of principal and accrued interest on May 23, 2007."
2. Enter the **Value** of the debt or note. The program will convert whole dollar entries to currency format for you.
3. Enter the amount of any **Accrued Interest** for the debt or note that had accrued as of the date of death but had not yet been credited.
4. If you are adding/updating an asset on the **Community Property** form, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset on the **Community Property** form after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Securities Overview

Asset description categories in the **Securities** listing are shown below. Click **Entering Asset Information** 105 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Brokerage Accounts
Brokerage Account Securities
Common and Preferred Stocks
Mutual Funds
Stock Options
Corporate, State and Municipal Bonds
United States Treasury Notes and Bonds
Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC) Security
United States Savings Bonds
Other Securities

If a **Securities** asset doesn't fit into any other category, enter the asset in the **Other Securities** category.

Entering Asset Information

The window used for **Securities** assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

Figure 13, Example Securities Entries

Description - Enter a description of the security. Click the **Help** button to see a detailed description of required entries for each type of security.

Appraised Value - Enter the appraised value of the security.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the security qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Securities** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information

to the **Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Other Intangible and Unscheduled Property

This window helps you enter assets which do not fit into any other listed category. To enter new assets or update existing asset descriptions in this category, follow the steps below:

1. Enter a **Description** of the asset in the designated field. Include a full description of intangible property not included in any of the previously described categories that was owned by the Decedent. Example: "Copyright and future royalty stream from 2001 book, 'The Life and Times of J.J. Schmidt', ISBN no. 1234567890, published by Narcissus Press."
2. Enter the **Appraised Value** of the property. The program will convert whole dollar entries to currency format for you.
3. If you are adding/updating an asset on the **Community Property** form, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset on the **Community Property** form after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Selecting a Case

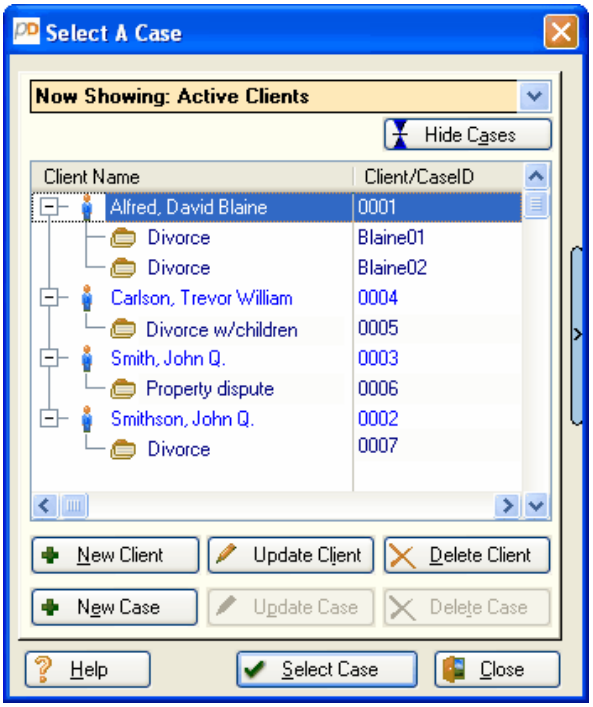


Figure 14, Select a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input. It lists existing ProDoc clients and all cases for the clients. You can use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click on a displayed case and then press the **Enter** key.
- Click on a displayed case and then click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients.** Other choices are **All Contacts and Cases, Closed Clients, Private Clients** and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

Select a Date Window

Figure 15, Select a Date Window

This window helps you quickly complete date fields. Tools and buttons on this calendar tool, depicted as Figure 15, include:

- and - Click to move back or forward one year.
- and - Click to move back or forward one month.
- and - Click to move back or forward one week.
- Use **Up** and **Down** arrow keys to move back and forward one week.
- Use **Left** and **Right** arrow keys to move back and forward one day.
- Click **Today** to move the underline/highlight to today's date.
- Click on the date to choose it or press the **Enter** key to choose the underlined date.
- Click **Cancel** to close the calendar without choosing a date.

California Property Declaration & Distribution

Getting Started

The **Property Declaration & Distribution** program is used to gather information about the parties' property and how it is to be divided. This program allows you to:

- Enter and save information related to the parties and their estate.
- Create scenarios to display and save different divisions of the property.
- List and assign property.
- Determine after tax property values.
- View pre-tax and after tax statistics for the assets and net estate amounts.

Starting the Program

To open the **Property Declaration & Distribution** program:

1. Click **PowerPacks → Family Law → Property Declaration & Distribution.**
2. The **Select a Case** 127 window opens. Select a case by double-clicking a visible case title. You can also click the title once, then press the **Enter** key or click the **Select** button. Click the **Help** button on the window for detailed help for finding and selecting cases.
3. The program opens to the **General** 110 tab.

Navigating the Property Declaration & Distribution Program

The **Property Declaration & Distribution** program has seven main forms, shown in tabs across the top of the screen: **General** 110, **Community Property** 115, **Petitioner Separate Property** 119, **Respondent Separate Property** 121, **After Tax Values** 123, **Pre-Tax Statistics** 125, and **After Tax Statistics** 126. These forms, and other windows you will see when completing the forms, are discussed in this manual in the order in which the forms are listed.

This program has built-in hot key navigation. Wherever a window, form or field title shows an underlined character, i.e., **"Primary Attorney",** you can navigate to that entry by holding the "**Alt**" key and pressing the underlined keyboard character. In the earlier example, pressing **Alt + A** on your keyboard puts your cursor in the **Primary Attorney** field.

Main Toolbar

Figure 1, Main Toolbar

The toolbar at the bottom of the program window consists of the **Help**, **Import Data**, **Export Data**, **Print**, **Save and Continue**, **Save and Close** and **Cancel** buttons. This toolbar is always available while you are using the program. The buttons and their actions are discussed below.

Help - Click this button to call up the help topic for the window you are viewing.

Import Data - Click this button to import scenario data from a backup file into the program.

Export Data - Click this button to export all data from the current loaded scenario to either your hard

drive, a connected network drive or a removable media drive.

Send to Excel - Click this button to send all categories and data from the **Community Property, Petitioner Separate Property, Respondent Separate Property,** and **After Tax Values** forms to an Excel spreadsheet. Information for each form will be displayed on a separate sheet.

Print - Click this button to print and/or preview one or more of the forms designed to work with the program.

Save and Continue - Click this button to save the data entered and continue working with the program.

Save and Close - Click this button to save the data entered and exit the program.

Cancel - Click this button to exit the program without saving the information that you entered during the current session.

General Form

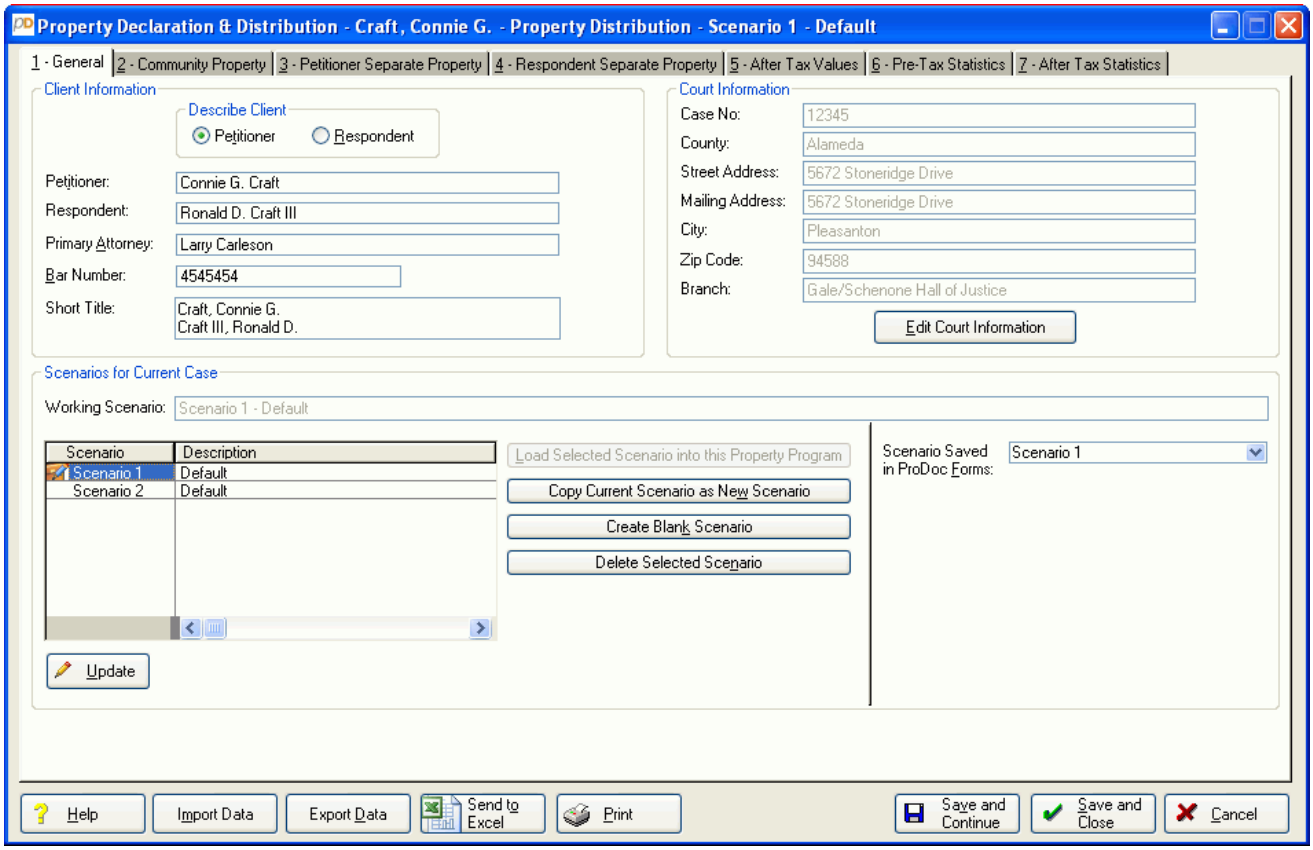


Figure 2, General Form

In this section:

[Completing Fields on the General Form](#) 111
[About Scenarios](#) 111
[Loading Scenarios](#) 112
[Creating A New Scenario](#) 112
[Changing Scenario Names And Descriptions](#) 113

On the **General Form**, you designate your client as **Petitioner** or **Respondent,** enter the opposing party's name, enter the **Primary Attorney** name and **Bar Number** and enter the requested court information. You can also load, save, create and delete scenarios on this form.

Before completing the entries on this form, you should ensure that the correct client and case appear at the top of the window. If not, click the **Cancel** button at the bottom of the form, open the program again and select the case you want to use.

Completing Fields on the General Form

To complete the fields on the **General Form**:

1. In the **Client Information** section, click the **Petitioner** or **Respondent** radio button to indicate your client's status in the **Describe Client** subsection. Your client's name will appear in the appropriate field.
2. Enter the name of the opposing party in the **Petitioner** or **Respondent** field as appropriate.
3. Enter the preparing **Primary Attorney** and **Bar Number** in the fields provided.
4. Enter the **Short Title** of the case, normally the last name, any suffix, first name and middle initial of the **Petitioner** on the first line, then press the **Enter** key and enter the last name, first name and middle initial of the **Respondent** on the second line. For instance, "John K. Smith III" should be entered as "Smith III, John K."
5. In the **Court Information** section, click the **Edit Court Information** button. Provide the requested information in the **Court Information** section.
    a. Enter the **Case Number**.
    b. Choose the **County** by clicking the drop-down arrow field and clicking on the desired county.
    c. Choose the **Branch** by clicking the drop-down arrow field and selecting one of the available entries for the selected county. If there is only one existing branch, it will be selected for you.
    d. The **Street Address, Mailing Address**, **City** and **Zip Code** fields should be automatically completed for you depending upon your previous selections. If necessary, type in the information.

Scenarios

The **Property Declaration & Distribution** program allows you to create scenarios. Scenarios contain a list of the parties' property and how the property is to be divided. You can divide the property as you want and save each division as a scenario. In fact, creating multiple scenarios for your cases can provide you with a useful negotiating tool. Scenarios can help you compare what the parties want and what the judge is likely to order, and they help you get a better look at the big picture.

When creating multiple scenarios, it is important to remember that the scenario on which you are working in the **Property Declaration & Distribution** program is not necessarily the scenario that will be used in the ProDoc forms. Only one scenario is actually used to assemble documents for your client's case out of all of the scenarios you create to determine the best division of property. There are fields on this form that allow you to see which scenario is being used by the **Property Declaration & Distribution** program and which scenario will be used in ProDoc's forms. Before creating documents in ProDoc that use information from the **Property Declaration & Distribution** program, you should make sure that the correct scenario is displayed in the **Scenario Saved in ProDoc Forms** field so the correct information appears in your documents.

You may load, copy, create and delete scenarios using the buttons in the center of the **Scenarios for**

Current Case section of the window. Previously created and saved scenarios are listed in this section. If there is an icon to the left of a scenario's name, it means that it is currently loaded for use in the **Property Declaration & Distribution** program. Figure 3 displays the section of the **General Form** used for working with scenarios.

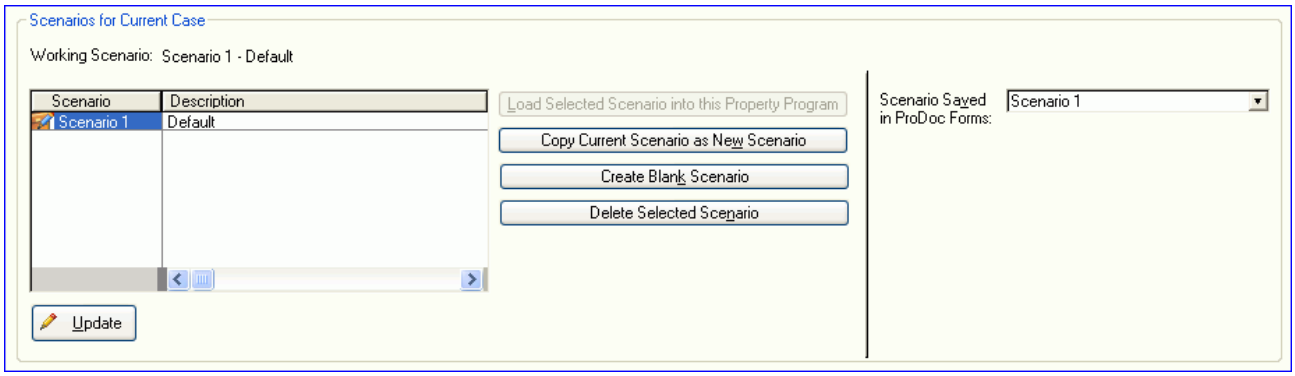


Figure 3, Scenarios Section

Loading Scenarios

To load a scenario for use in the **Property Declaration & Distribution** program:

1. Highlight the scenario you want to use from the list of scenarios in the **Scenarios for Current Case** section.
2. Click the **Load Selected Scenario into this Property Program** button.
3. The **Confirm** box appears and asks if you want to save the currently loaded scenario before loading the scenario you chose in Step 1.
   a. Click **Yes** if you want to save any changes you made to the currently loaded scenario.
   b. Click **No** if you do not want to save any changes you made to the currently loaded scenario.
4. The name of the scenario you have just loaded now appears as the Working Scenario above the scenario listing. At this point your scenario is loaded in the program and is ready to be updated.

Saving Scenarios

To save changes made to a scenario as a new scenario:

1. Click the **Copy Current Scenario as New Scenario** button.
2. The **Confirm** box appears.
   a. Click **Yes** to save the changes that have been made to the current scenario.
   b. Click **No** to close the current scenario and copy the current scenario and the changes that have been made to a new scenario.
   c. Click **Cancel** to return to the **Property** Inventory without copying the current scenario.
3. The **Create New Scenario** box appears.
   a. Enter a name for the scenario in the **Scenario Name** field.
   b. Enter a description of the scenario in the **Scenario Description** field.
4. Click **OK**.

Creating a New Scenario

To create a new blank scenario:

1. Click the **Create Blank Scenario** button.
2. The **Confirm** box appears and asks if you want to save the scenario that is currently loaded in the **Property Declaration & Distribution** program.
    a. Click **Yes** to save any changes you made to the currently loaded scenario.
        i. The **Create New Scenario** box appears.
        ii. Enter a scenario name and description.
        iii. Click **OK**.
        iv. You may now enter information for the scenario.
    b. Click **No** to discard changes you made to the currently loaded scenario.
        i. The **Create New Scenario** box appears.
        ii. Enter a scenario name and description.
        iii. Click **OK**.
        iv. You may now enter information for the scenario.
    c. Click **Cancel** to return to the **Property Declaration & Distribution** program without creating a new scenario.

Deleting a Scenario

To delete a scenario:

1. Select a scenario from the list.
2. Click the **Delete Selected Scenario** button.
3. The **Confirm** box appears and asks if you want to delete the selected scenario.
4. Click **Yes** to delete the scenario.

NOTE: If the scenario you are deleting is the current scenario that is listed in the **Scenario Saved in ProDoc Forms** field**,** the **Select a ProDoc Scenario** box appears. Click the drop down arrow, select another scenario to load in ProDoc and click **OK**.

If the scenario you are deleting is the only scenario for the selected client and case, the **Confirm** box appears. Click **Yes** to delete all of the inventory answers except for the general information, which includes the names of the petitioner and respondent, court information and which party is the petitioner and client.

Changing Scenario Names or Descriptions

To change a scenario's name or description:

1. Double-click a scenario on the list, or click a scenario on the list and click the **Update** button.
2. The **Change Scenario** box appears.
3. Enter a new name and/or description for the scenario and click **OK**.

The information that you enter for a scenario may be used for document assembly in ProDoc, but the scenario must be loaded in ProDoc before it may be used. The **Scenarios for Current Case** section (displayed in Figure 3) displays which scenario is loaded in the **Property Declaration & Distribution**

program as the **Working Scenario** and allows you to load a scenario for document assembly in ProDoc using the **Scenario Saved in ProDoc Forms** field.

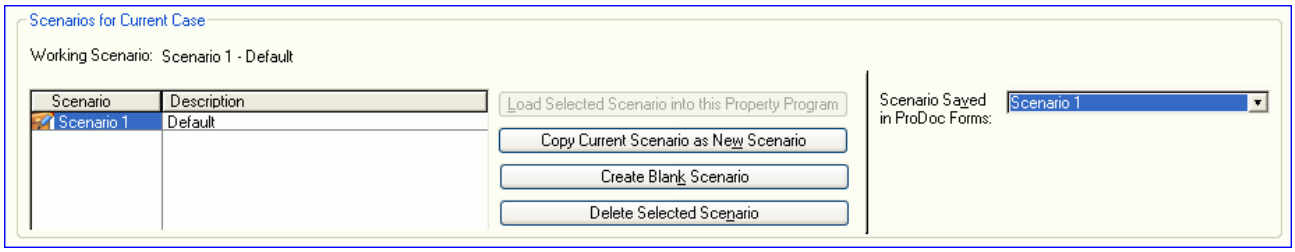


Figure 4, Scenarios Used Fields

The scenario shown as the **Working Scenario** and the scenario shown in the **Scenario Saved in ProDoc Forms** field may be different because the scenario on which you are working in the **Property Declaration & Distribution** program is not necessarily the scenario that you will use when creating documents in ProDoc.

The scenario shown as the **Working Scenario** is the scenario that is currently loaded in the **Property Declaration & Distribution** program. This is the scenario to which you can make changes in the **Property Declaration & Distribution** program. You may change this scenario by highlighting a scenario in the **Scenarios for Current Case** list and clicking the **Load Selected Scenario into this Property Program** button.

The scenario shown in the **Scenario Saved in ProDoc Forms** field is the scenario that ProDoc will use to create documents. This scenario is used for the actual document assembly in ProDoc. You may change this scenario by clicking the drop-down arrow field and choosing the scenario that you want to use to assemble documents in ProDoc. If you change the scenario, you must click the **Save and Continue** button to activate the new scenario in ProDoc.

Printing Forms

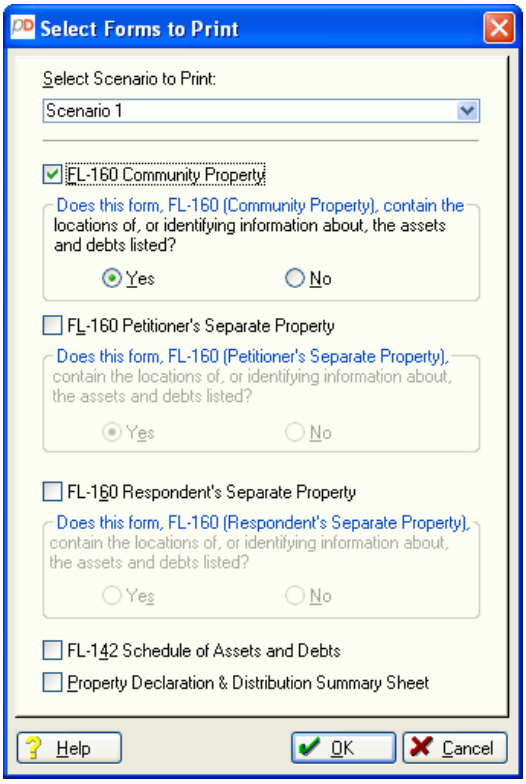

Select Forms to Print
Select Scenario to Print:
Scenario 1
FL-160 Community Property
Does this form, FL-160 (Community Property), contain the locations of, or identifying information about, the assets and debts listed?
Yes
No
FL-160 Petitioner's Separate Property
Does this form, FL-160 (Petitioner's Separate Property), contain the locations of, or identifying information about, the assets and debts listed?
Yes
No
FL-160 Respondent's Separate Property
Does this form, FL-160 (Respondent's Separate Property), contain the locations of, or identifying information about, the assets and debts listed?
Yes
No
FL-142 Schedule of Assets and Debts
Property Declaration & Distribution Summary Sheet
Help
OK
Cancel

Figure 5, Select Forms to Print Window

To print forms from the program, click the **Print** button on the main toolbar at the bottom of the screen. The **Select Forms to Print** window appears, similar to Figure 5.

Select the scenario to print by clicking the drop-down arrow field and clicking the desired scenario.

Click the box next to the form(s) that you want to print and/or preview on the list that appears. For FL-160 forms, a question is listed: "Does this form, FL-160 (version), contain the locations of, or identifying information about, the assets and debts listed?". This question corresponds to a required check box on the completed form. The default answer is **Yes.** If this is not correct, click the button labeled **No**.

When you are finished selecting forms, click the **OK** button to print and/or preview the form. The **Preview** window appears and asks if you want to review the report. Click **Yes** if you want to review form before printing it. Click **No** if you want to print the form without reviewing it. Click **Cancel** if you decide not to view or print the form.

The forms that can be printed using information from the **Property Declaration & Distribution** program are:

- FL-160 Community Property
- FL-160 Petitioner's Separate Property
- FL-160 Respondent's Separate Property
- FL-142 Schedule of Assets and Debts

Other reports that can be printed include:

- Net (After-Tax) Values Sheet
- Pre-Tax Statistics Sheet
- After-Tax Statistics Sheet
- Property Declaration & Distribution Summary Sheet

Community Property Form

The **Community Property Form** allows you to enter details regarding community property, the value of the property, and the person(s) to whom the property is allocated. This is the first of three property forms in the **Property Declaration & Distribution** program.

Click one of the following links to jump to descriptions and procedures, or scroll down to see these in the order shown:

How Assets and Debts are Displayed 116
Locating Asset and Debt Descriptions 117
Entering New Assets and Debts 117
Editing Asset and Debt Entries 117
Deleting Asset and Debt Entries 117
Using Toolbar Buttons to work with Assets and Debts 117

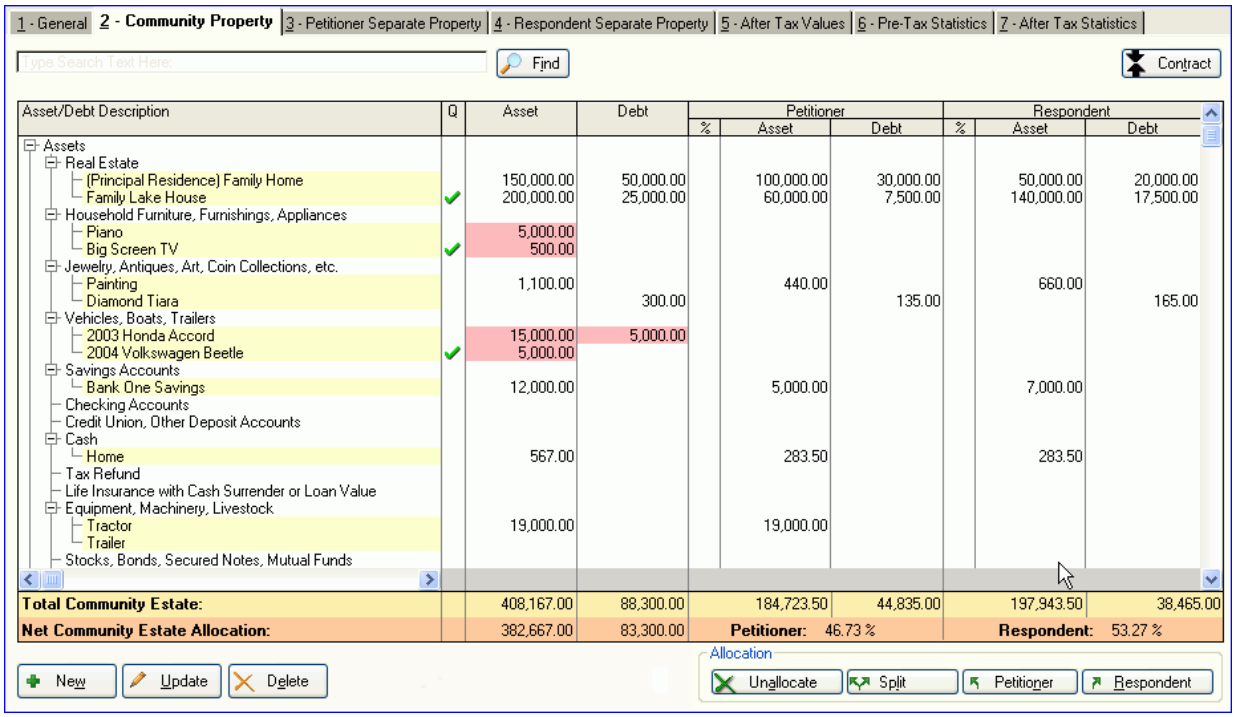


Figure 6, Community Property Form

How Assets and Debts are Displayed

The information for each asset or debt is displayed in columns: **Asset/Debt Description**, **Q** (Quasi-Community Property, identified by a green check mark), **Asset** (amount), **Debt** (amount), **Petitioner %** (of Asset/Debt), **Petitioner Asset** and **Debt** (amounts), **Respondent %** (of Asset/Debt), and **Respondent Asset** and **Debt** (amounts). As you enter assets and debts, a running total is displayed under the listing, consisting of the **Total Community Estate** amounts (yellow background color) and **Net Community Estate Allocation** amounts (peach background color). The percentages of the estate allocation are also listed for both Petitioner and Respondent.

The **Petitioner %** and **Respondent %** columns will **only** contain an entry when a user chooses to ignore the values and allocate the asset or debt by percentage. Users can clear the appropriate check box to remove the displayed percentage amounts and reveal the values or amounts in the appropriate columns.

Entries of actual assets/debts are highlighted in yellow. The values of assets which were entered as community property but are not yet allocated will be highlighted in silver-grey.

To view all asset and debt descriptions, click the **Expand** button in the top right side of the form. This button serves as both an **Expand** and **Contract** button. To view only the main titles of the category groups within the **Asset/Debt Description** window, click the **Contract** button. You can also click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Assets and Debt Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Ensure the list is fully expanded. Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset/Debt Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset/Debt Description** list.

Entering New Assets and Debts

1. Double-click a description, or click a description once and click **New.** You can also right-click a description and click **New** on the pop-up menu.
2. A window will appear titled with the description you chose. It will display appropriate fields to enter for the asset or debt and buttons and fields for allocation between the parties.
3. In the **General** section, complete the displayed fields for the asset or debt. To enter the **Date Acquired** or other dates, type the date in the format shown, or click on the calendar icon to pick the date from the displayed calendar. Click **here** 128 for detailed help in using the **Select a Date** window.
4. Use the remaining portions of the window to allocate the amounts of the asset and/or debt between the petitioner and respondent. Click **here** 118 for detailed help on allocating the asset or debt.
    a. **Allocate Assets** and/or **Allocate Debt** sections. Use the buttons and fields to specify the allocation of assets/debts. For assets, you can allocate the values of the asset and any debt against it. For debts, you simply allocate the debt amount.
    b. **Allocate Using Percentage** section. If you wish to display only percentages of allocation on the **Community Property Form**, click the check box here to do this. Use the buttons and fields to specify the allocation percentage. If you clear the check box, the values or amounts will be displayed on the **Community Property Form** and the percentages will be cleared.
5. When you are finished, either click the **Add Another** button to save your entries and enter another asset or debt in the same category or click the **OK** button to return to the **Community Property Form**. The description, amounts and allocations will be listed here.

Editing Asset and Debt Entries. You may edit an entry by using any of the following methods:

- Double-click the asset or debt description.
- Right-click the asset or debt description and click **Update** on the pop-up menu.
- Click the asset or debt description to highlight it and click the **Update** button on the toolbar.

Deleting Asset and Debt Entries. To delete an asset or debt entry, click on the entry to highlight it and click the **Delete** button. You can also right-click the entry and click **Delete** on the pop-up menu.

Using Toolbar buttons to work with Assets and Debts

First, find and click the line containing the asset/debt. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and allocation (if necessary) of an asset or debt to the inventory.

Update - Modify a highlighted asset or debt.

Delete - Remove a highlighted asset or debt.

Unallocate - Remove previous allocations of the highlighted asset or debt. This button is grayed out if no allocation exists.

Split - Divide the highlighted asset or debt between the parties. Click this button to open the asset or debt window, where you can change the allocation as desired. Click **here** 118 for detailed help with allocating assets or debts.

Petitioner - Allocates the highlighted asset or debt entirely to the petitioner.

Respondent - Allocates the highlighted asset or debt entirely to the respondent.

Allocating Community Property

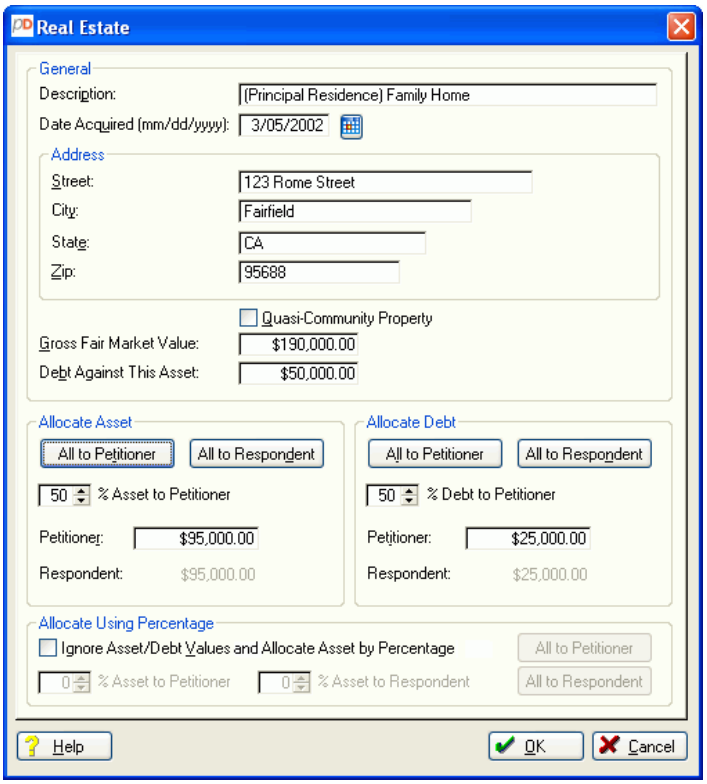


Figure 7, Community Property Asset Entry Window

Figure 7 displays an asset entry window of a community property asset. The bottom half of the window contains the **Allocate Asset, Allocate Debt** and **Allocate Using Percentage** sections. These boxes allow you to specify the allocation of assets/debts between the petitioner and respondent. For assets, you can allocate the values of the asset and any debt against it in both the **Allocate Asset** and **Allocate Debt** sections. For debts, only one section is displayed, which you use to allocate the debt amount.

You can use the **Allocate Using Percentage** section to display only the percentage of allocation on the **Community Property** form rather than displaying the amounts.

Use any of the procedures below to complete both the **Allocate Asset** and **Allocate Debt** sections for assets or only the **Allocate Debt** section for debts.

- Click the **All to Petitioner** or **All to Respondent** button to assign the total amount to either party.
- To assign less than the total amount, use the box labeled **% Asset to Petitioner**. Click on the arrows to raise or lower the percentage, or type in the percentage. The **Respondent** percentage will be calculated automatically.
- If you don't use either of the above methods, you can type the amount to allocate to the **Petitioner** in the field provided. The **Respondent** amount will be calculated automatically.

Displaying Allocation Percentages. Use the **Allocate Using Percentage** section to display allocation percentages instead of amounts on the **Community Property** form. This section's check box and fields will be labeled differently according to whether the window is used for an asset or for a debt, but the functions are the same on each.

- Click the check box to activate the displayed fields and buttons.
- Click the **All to Petitioner** or **All to Respondent** buttons to allocate 100 percent to either party.
- Click the up and down arrows in the percentage allocation fields to raise or lower the percentage, or type in the desired percentage. The other percentage field will be automatically adjusted.

If you clear the check box in this section, the allocation percentages will be removed from the **Community Property** form and the amounts will be displayed.

If you are entering and allocating a **new** asset or debt, the **Add Another** button appears at the bottom of the window. Click this button to save your current entries and immediately add another asset or debt in the same category. When you are finished adding and allocating assets/debts in this category, click the **OK** button to save your entry and return to the **Community Property** form. Click **Cancel** to discard your entries and close the window.

Petitioner Separate Property Form

The **Petitioner Separate Property Form** allows you to enter details regarding the petitioner's separate property and the value of the property.

Click one of the following links to jump to descriptions and procedures, or scroll down to see these in the order shown:

How Assets and Debts are Displayed 120
Locating Asset and Debt Descriptions 120
Entering New Assets and Debts 120
Editing Asset and Debt Entries 121
Deleting Asset and Debt Entries 121
Using Toolbar Buttons to work with Assets and Debts 121

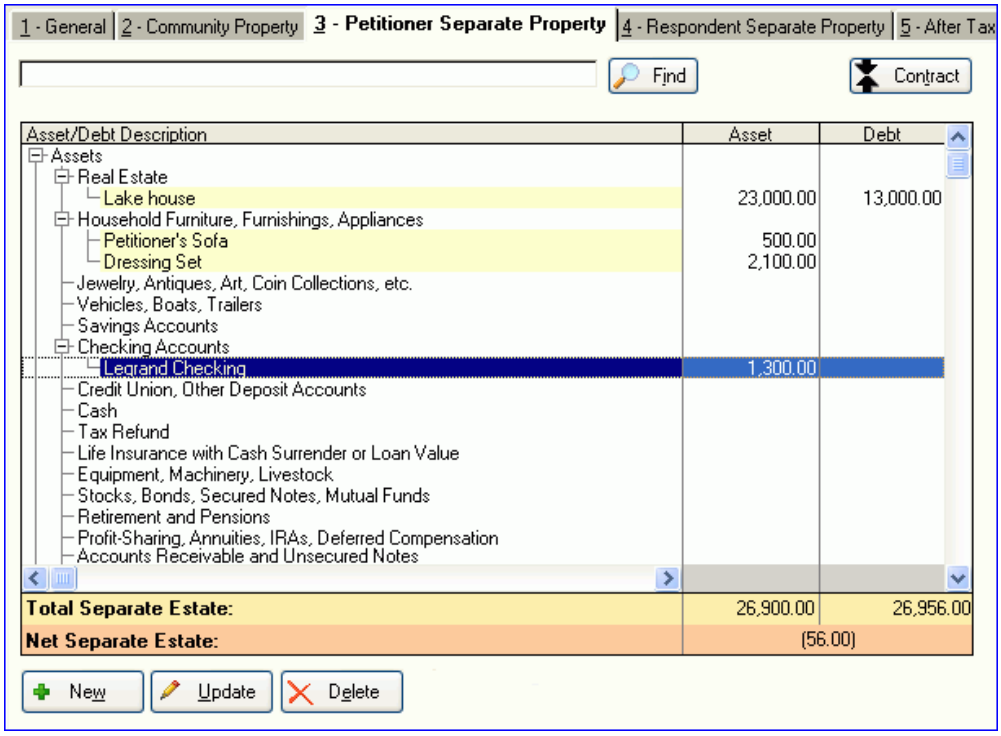


Figure 8, Petitioner Separate Property Form

How Assets and Debts are Displayed

The information for each asset or debt is displayed in columns: **Asset/Debt Description**, **Asset** (amount) and **Debt** (amount). As you enter assets and debts, a running total is displayed under the listing, consisting of **Total Separate Estate** amounts (yellow background color) and **Net Separate Estate** amounts (peach background color). Entries of actual assets/debts are highlighted in yellow.

To view all asset and debt descriptions, click the **Expand** button in the top right side of the form. This button serves as both an **Expand** and **Contract** button. To view only the main titles of the category groups within the **Asset/Debt Description** window, click the **Contract** button.

Locating Assets and Debt Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Ensure the list is fully expanded. Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset/Debt Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset/Debt Description** list.

Entering New Assets and Debts

1. Double-click a description, or click a description once and click **New.** You can also right-click a description and click **New** on the pop-up menu.
2. A window will appear titled with the description you chose. It will display the appropriate entry fields for the asset or debt.

3. Complete the displayed fields for the asset or debt. To enter the **Date Acquired**, type it in the format shown, or click on the calendar icon to pick the date from the displayed calendar. Click **here** 128 for detailed help in using the **Select a Date** window.
4. When you are finished, either click the **Add Another** button to save your current entries and enter another asset or debt in the same category or click the **OK** button to return to the **Petitioner Separate Property Form**. The description and amounts will be listed here.

Editing Asset and Debt Entries. You may edit an entry by using any of the following methods:

- Double-click the asset or debt description.
- Right-click the asset or debt description and click **Update** on the pop-up menu.
- Click the asset or debt description to highlight it and click the **Update** button on the toolbar.

Deleting Asset and Debt Entries. To delete an asset or debt entry, click on the entry to highlight it and click the **Delete** button. You can also right-click the entry and click **Delete** on the pop-up menu.

Using Toolbar buttons to work with Assets and Debts

First, find and click the line containing the asset/debt. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description and value of an asset or debt to the inventory.

Update - Modify a highlighted asset or debt.

Delete - Remove a highlighted asset or debt.

Respondent Separate Property Form

The **Respondent Separate Property Form** allows you to enter details regarding the respondent's separate property and the value of the property.

Click one of the following links to jump to descriptions and procedures, or scroll down to see these in the order shown:

How Assets and Debts are Displayed 122
Locating Asset and Debt Descriptions 122
Entering New Assets and Debts 122
Editing Asset and Debt Entries 123
Deleting Asset and Debt Entries 123
Using Toolbar Buttons to work with Assets and Debts 123

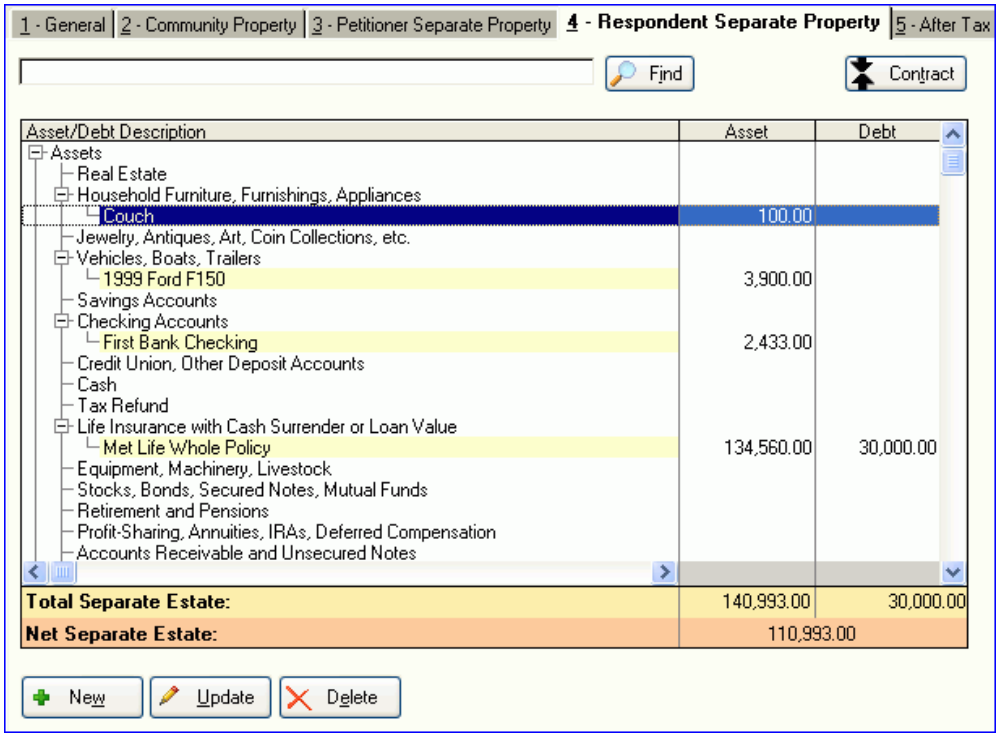


Figure 9, Respondent Separate Property Form

How Assets and Debts are Displayed

The information for each asset or debt is displayed in columns: **Asset/Debt Description**, **Asset** (amount) and **Debt** (amount). As you enter assets and debts, a running total is displayed under the listing, consisting of **Total Separate Estate** amounts (yellow background color) and **Net Separate Estate** amounts (peach background color). Entries of actual assets/debts are highlighted in yellow.

To view all asset and debt descriptions, click the **Expand** button in the top right side of the form. This button serves as both an **Expand** and **Contract** button. To view only the main titles of the category groups within the **Asset/Debt Description** window, click the **Contract** button.

Locating Assets and Debt Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Ensure the list is fully expanded. Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset/Debt Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset/Debt Description** list.

Entering New Assets and Debts

1. Double-click a description, or click a description once and click **New.** You can also right-click a description and click **New** on the pop-up menu.
2. A window will appear titled with the description you chose. It will display the **Asset** or **Debt** tab entry fields as appropriate.

3. Complete the displayed fields for the asset or debt. These will change according to the type of asset or debt you are entering. To enter the **Date Acquired**, type it in the format shown, or click on the calendar icon to pick the date from the displayed calendar. Click **here** 140 for detailed help in using the **Select a Date** window.
4. When you are finished, either click the **Add Another** button to save your entries and enter another asset or debt in the same category or click the **OK** button to return to the **Respondent Separate Property Form**. The description and amounts will be listed here.

Editing Asset and Debt Entries. You may edit an entry by using any of the following methods:

- Double-click the asset or debt description.
- Right-click the asset or debt description and click **Update** on the pop-up menu.
- Click the asset or debt description to highlight it and click the **Update** button on the toolbar.

Deleting Asset and Debt Entries. To delete an asset or debt entry, click on the entry to highlight it and click the **Delete** button. You can also right-click the entry and click **Delete** on the pop-up menu.

Using Toolbar buttons to work with Assets and Debts

First, find and click the line containing the asset/debt. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description and value of an asset or debt to the inventory.

Update - Modify a highlighted asset or debt.

Delete - Remove a highlighted asset or debt.

After Tax Values Form

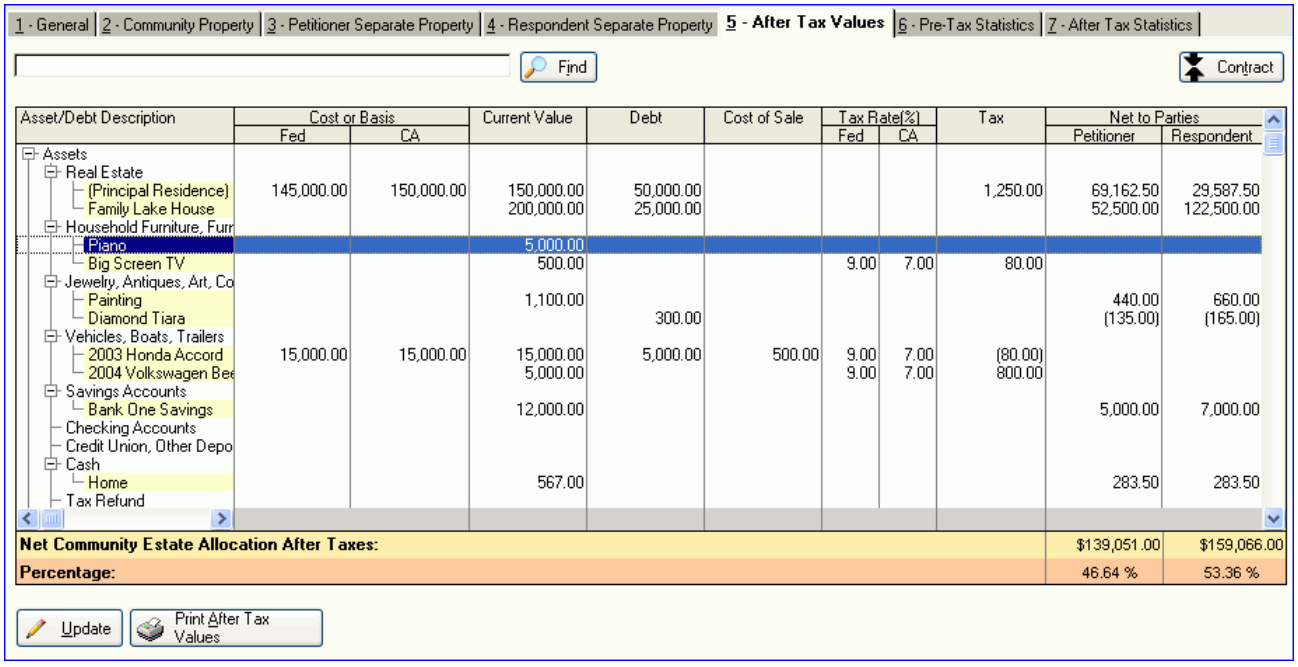


Figure 10, After Tax Values Form

The **After Tax Values Form** allows users to enter amounts for the **Cost or Basis**, **Cost of Sale** and **Tax Rate**, calculates tax amounts and displays net values after taxes. Amounts on this form are

categorized as **Cost or Basis,** displayed for **Fed** (Federal) or **CA** (California), **Current Value**, **Cost of Sale**, **Tax Rate (%),** displayed for **Fed** (Federal) or **CA** (California), **Tax**, and **Net to Parties,** displayed for **Petitioner** and **Respondent**. The **Net Community Estate Allocation After Taxes** amounts (yellow background color) and **Percentage** (peach background color) are displayed at the bottom of the listing. These amounts are updated as values are changed.

To view all asset and debt descriptions, click the **Expand** button in the top right side of the form. This button serves as both an **Expand** and **Contract** button. To view only the main titles of the category groups within the **Asset/Debt Description** window, click the **Contract** button.

Locating Assets and Debt Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Ensure the list is fully expanded. Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset/Debt Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset/Debt Description** list.

Entering Cost or Basis, Cost of Sale and Tax Rates. Note that you can only enter data for assets previously entered as community property. You cannot add or delete assets or debts on this form.

1. Double-click an asset description, or click an asset description to highlight it and click **Update**. You can also right-click an asset description and click **Update** on the pop-up menu.
2. The **Change the Cost and Tax Rate** window will appear with the title of the property, name of the asset and current value displayed.
3. Enter the **Cost or Basis** and **Cost of Sale** for both the **Federal** and **California** categories.
   a. For the principal residence, you will need to enter the **Principal Residence Exclusion.**
   b. After you enter the **Principal Residence Exclusion**, click on the **Depreciation** button and enter the depreciation recapture amount (if any). Click **Depreciation Recapture** 125 or scroll further for more information on this entry.
4. Either type in the **Tax Rate (%)** for each category or use the spin buttons to enter the rate. The tax rates you enter will become the default entries when you update an asset that has no previously entered tax rate.
5. Click the **OK** button to save your entries and return to the **After Tax Values Form**. The amounts will be listed here, including the calculated tax value.

Using Toolbar buttons to work with After Tax Values

Update - Modify entries for a highlighted asset.

Print After Tax Values - View and/or print a Net Value Sheet which lists the community assets and debts claimed. When you click the button, a window appears asking if you want to preview the report. Click **Yes** to preview it before printing; click **No** to print without preview; click **Cancel** to stop the preview/print process.

Depreciation Recapture

If the **Principal Residence** home has been rented or has a home office, depreciation may have been taken on the home. Enter the amount of depreciation that has been claimed on the principal residence since **May 6, 1997.** Tax on the depreciation will be calculated at the appropriate federal and/or state tax rate.

Pre-Tax Statistics Form

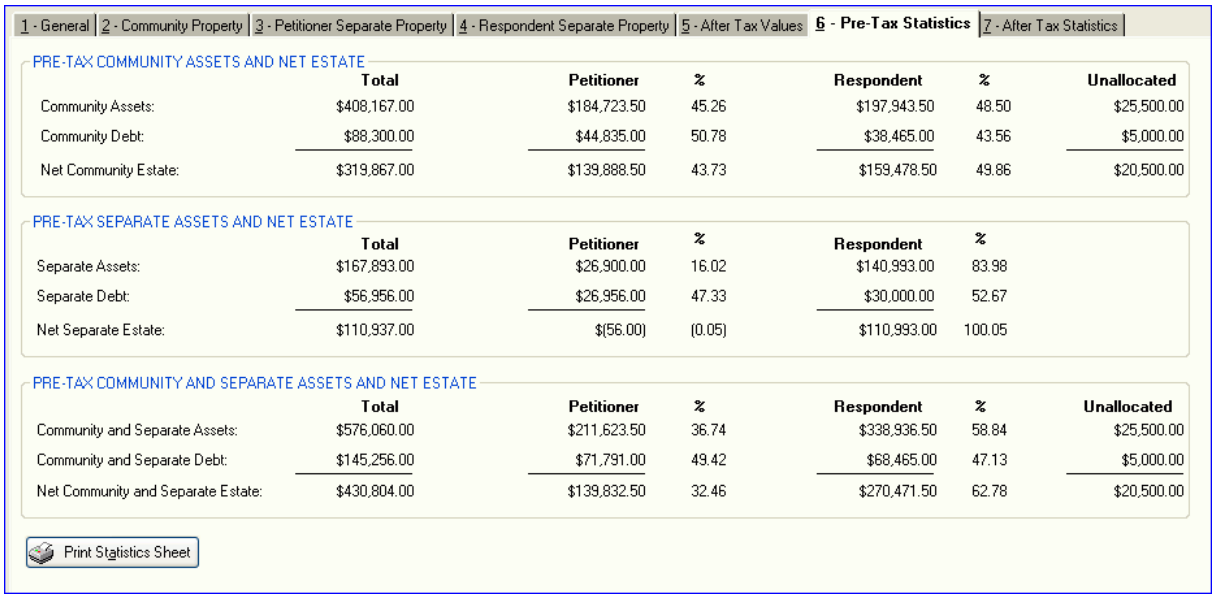

1 - General
2 - Community Property
3 - Petitioner Separate Property
4 - Respondent Separate Property
5 - After Tax Values
6 - Pre-Tax Statistics
7 - After Tax Statistics
PRE-TAX COMMUNITY ASSETS AND NET ESTATE
Total Petitioner % Respondent % Unallocated
Community Assets: $408,167.00 $184,723.50 45.26 $197,943.50 48.50 $25,500.00
Community Debt: $88,300.00 $44,835.00 50.78 $38,465.00 43.56 $5,000.00
Net Community Estate: $319,867.00 $139,888.50 43.73 $159,478.50 49.86 $20,500.00
PRE-TAX SEPARATE ASSETS AND NET ESTATE
Total Petitioner % Respondent %
Separate Assets: $167,893.00 $26,900.00 16.02 $140,993.00 83.98
Separate Debt: $56,956.00 $26,956.00 47.33 $30,000.00 52.67
Net Separate Estate: $110,937.00 $(56.00) (0.05) $110,993.00 100.05
PRE-TAX COMMUNITY AND SEPARATE ASSETS AND NET ESTATE
Total Petitioner % Respondent % Unallocated
Community and Separate Assets: $576,060.00 $211,623.50 36.74 $338,936.50 58.84 $25,500.00
Community and Separate Debt: $145,256.00 $71,791.00 49.42 $68,465.00 47.13 $5,000.00
Net Community and Separate Estate: $430,804.00 $139,832.50 32.46 $270,471.50 62.78 $20,500.00
Print Statistics Sheet

Figure 11, Pre-Tax Statistics Form

The **Pre-Tax Statistics Form** displays community and separate assets and debts, and net estate amounts before taxes have been deducted. The form is divided into **Pre-tax Community Assets and Net Estate, Pre-Tax Separate Assets and Net Estate** and **Pre-Tax Community and Separate Assets and Net Estate** sections. These sections display pre-tax amounts for the total community assets and debts and the net community estate. The totals are further broken down to show the amounts allocated to the petitioner and respondent, and the amounts that have not been allocated. The amounts that have been allocated are also shown as percentages in the **Pre-Tax Community Assets and Net Estate** and **Pre-tax Community and Separate Assets and Net Estate** sections.

To print statistics sheets:

1. Click the **Print Statistics Sheet** button.
2. A list appears with the selections **Print this Sheet, Print After Tax Sheet, Print Both Pre-Tax and After Tax Sheet** or **Cancel.**
3. Select the statistics sheet(s) you want to print from the list or **Cancel** to proceed without printing.
4. The Preview window appears and asks if you want to review the report.
   a. Click **Yes** if you want to review the statistics sheet before printing it.
   b. Click **No** if you want to print the statistics sheet without reviewing it.
   c. Click **Cancel** if you do not want to view or print the statistics sheet.

After Tax Statistics Form

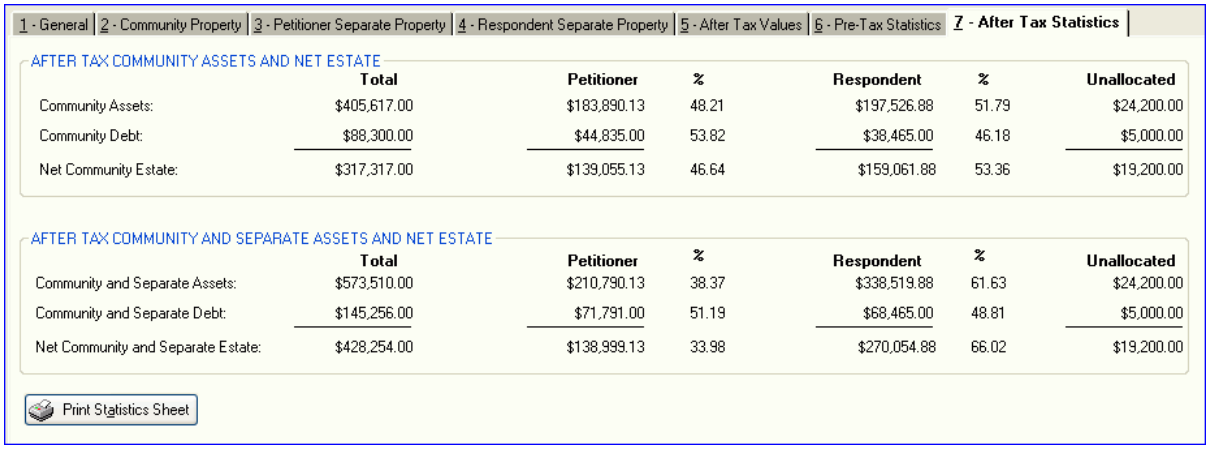

1 - General
2 - Community Property
3 - Petitioner Separate Property
4 - Respondent Separate Property
5 - After Tax Values
6 - Pre-Tax Statistics
7 - After Tax Statistics
AFTER TAX COMMUNITY ASSETS AND NET ESTATE
Total
Petitioner
%
Respondent
%
Unallocated
Community Assets: $405,617.00 $183,890.13 48.21 $197,526.88 51.79 $24,200.00
Community Debt: $88,300.00 $44,835.00 53.82 $38,465.00 46.18 $5,000.00
Net Community Estate: $317,317.00 $139,055.13 46.64 $159,061.88 53.36 $19,200.00
AFTER TAX COMMUNITY AND SEPARATE ASSETS AND NET ESTATE
Total
Petitioner
%
Respondent
%
Unallocated
Community and Separate Assets: $573,510.00 $210,790.13 38.37 $338,519.88 61.63 $24,200.00
Community and Separate Debt: $145,256.00 $71,791.00 51.19 $68,465.00 48.81 $5,000.00
Net Community and Separate Estate: $428,254.00 $138,999.13 33.98 $270,054.88 66.02 $19,200.00
Print Statistics Sheet

Figure 12, After Tax Statistics Form

The **After Tax Statistics Form** displays community and separate assets and debts, and net estate amounts after taxes have been deducted. The form is divided into **After Tax Community Assets and Net Estate** and **After Tax Community and Separate Assets and Net Estate** sections. The difference between the two sections is that the **After Tax Community and Separate Assets and Net Estate** section includes separate assets and debts along with the community assets and debts. These totals are further broken down to show the amounts allocated to the petitioner and respondent and the amounts that have not been allocated. The amounts that have been allocated to the petitioner and respondent are also shown as percentages.

To print statistics sheets:

1. Click the **Print Statistics Sheet** button.
2. A list appears with the selections **Print this Sheet, Print Pre-Tax Sheet, Print Both Pre-Tax and After Tax Sheet** or **Cancel.**
3. Select the statistics sheet(s) you want to print from the list or **Cancel** to proceed without printing.
4. The Preview window appears and asks if you want to review the report.
    a. Click **Yes** if you want to review the statistics sheet before printing it.
    b. Click **No** if you want to print the statistics sheet without reviewing it.
    c. Click **Cancel** if you do not want to view or print the statistics sheet.

Selecting a Case

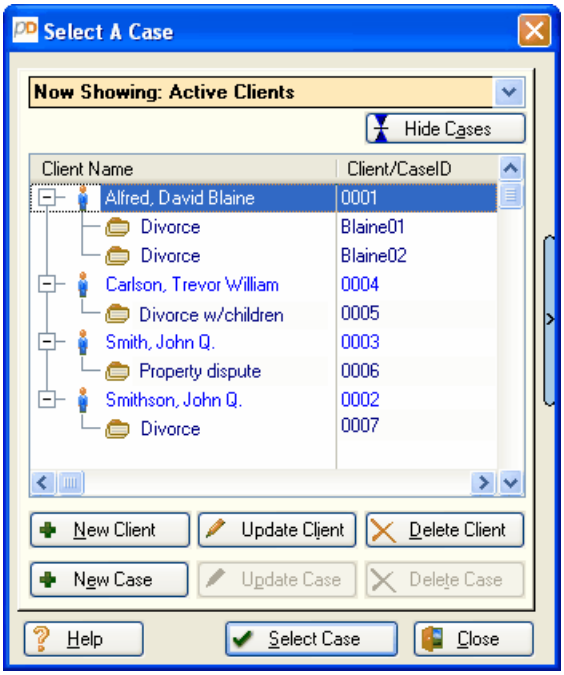


Figure 13, Selecting a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input. It lists existing ProDoc clients and all cases for the clients. You can use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click on a displayed case and then press the **Enter** key.
- Click on a displayed case and then click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients**. Other choices are **All Contacts, Closed Contacts, Private Clients** and **Non-Clients**.
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

Select a Date Window

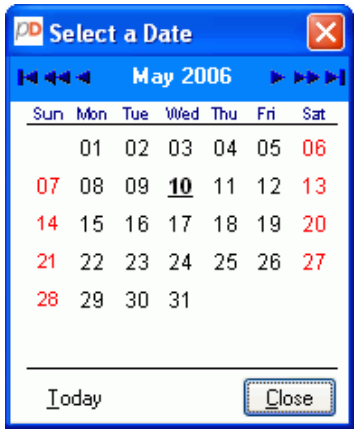


Figure 14, Selecting a Date Window

This window helps you quickly complete date fields. Tools and buttons on this calendar tool, depicted as Figure 14, include:

- and - Click to move back or forward one year.
- and - Click to move back or forward one month.
- and - Click to move back or forward one week.
- Use **Up** and **Down** arrow keys to move back and forward one week.
- Use **Left** and **Right** arrow keys to move back and forward one day.
- Click **Today** to move the underline/highlight to today's date.
- Click on the date to choose it or press the **Enter** key to choose the underlined date.
- Click **Close** to close the calendar without choosing a date.

Family Law - UCCJEA Declaration

Getting Started

The California Family Law - **UCCJEA (Uniform Child Custody Jurisdiction and Enforcement Act) Declaration** program is designed to assist you with entering the current address of each child, as well as the five year residential history of each child. As a part of the declaration, you can enter additional information regarding ancillary matters which affect the children. Finally, you can also list all third-parties claiming visitation and/or custody rights to the children.

This feature allows you to:

- Enter information about the parties and the children that are affected by the proceeding.
- Enter the current address of each child, as well as the five year residential history of each child.
- Enter the names and addresses of nonparties who may have actual physical custody of the child(ren), or are claiming visitation or custody rights for the child(ren) subject to the action.
- Enter other proceedings which concerned the child(ren) affected by this suit in which the declarant participated or had knowledge.
- Complete and print the **UCCJEA Declaration.**

Starting the Program

To open the **UCCJEA Declaration** program:

1. Click **PowerPacks → Family Law → UCCJEA Declaration**.
2. The **Select a Case** 139 window opens. Select a case by double-clicking a visible case title. You can also click the title once, then press the **Enter** key or click the **Select** button. Click the **Help** button on the window for detailed help for finding and selecting cases.
3. The **UCCJEA Declaration** program opens to the **General** 130 tab.

Using Links

Underlined text links appear throughout the help topics. Click these links to see more details on the indicated subject or window, or to see other related information.

Hot Keys

This program has built-in hot key navigation. Wherever a window, screen or field title shows an underlined character, i.e., "**Respondent**", you can navigate to that entry by holding the "**Alt**" key and pressing the underlined keyboard character. In the earlier example, pressing **Alt + O** on your keyboard puts your cursor in the **Respondent** field.

UCCJEA Toolbar

Figure 1, UCCJEA Toolbar

The toolbar along the bottom of the **UCCJEA Declaration** program consists of the **Help, Print, Save and Continue, Save and Close** and **Cancel** buttons. The buttons and their actions are discussed below.

Help - Click this button to see help for the form you are viewing.

Print - Click this button to generate the **UCCJEA Declaration** in ProDoc and print it. The **Print Preview** window will appear asking if you want to preview the document before printing it. Click the **Yes** button to preview the document before printing it. Click the **No** button to print the document without previewing it.

Save and Continue - Click this button to save your work and continue working in the program.

Save and Close - Click this button to save your work and close the program.

Cancel - Click this button to exit the program. A caution window appears, telling you that canceling will cause you to lose all information you entered since the last save, and asking you if you want to continue. To return to the program to save your work, click **No**. If you do not want to save your work, click **Yes**.

General Form

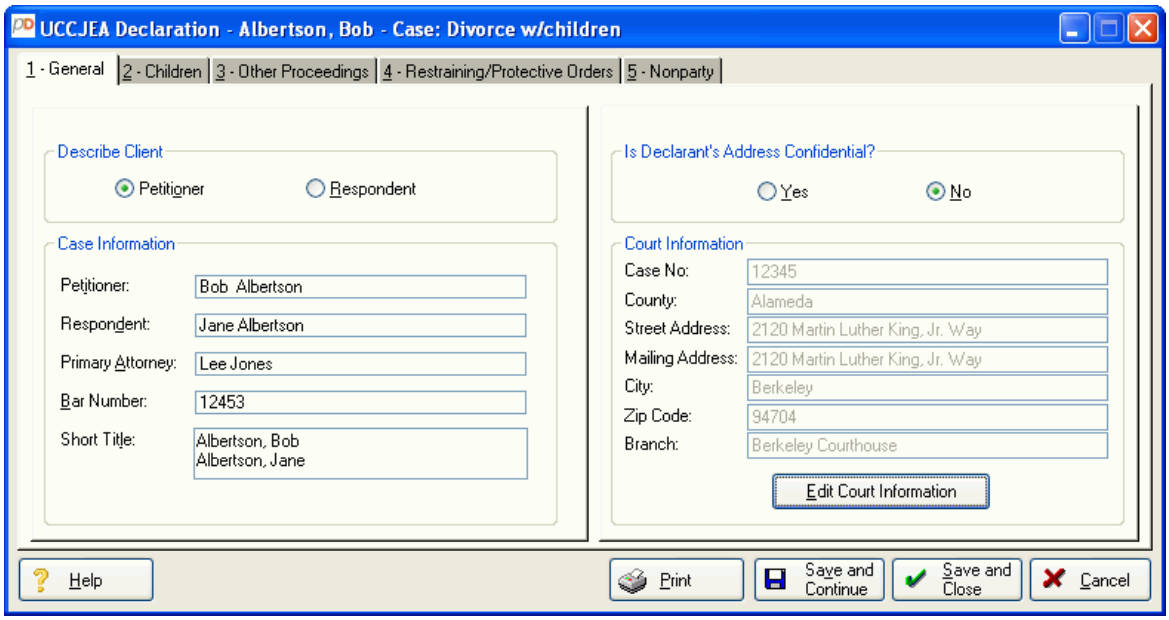


Figure 2, General Form

To complete the **General** form:

1. In the **Describe Client** section, select whether the Declarant is the **Petitioner** or **Respondent**. Click the appropriate radio button. The client's name will appear in the corresponding field in the **Case Information** section.
2. In the **Case Information** section:
   a. Enter the opposing party's name in the **Petitioner** or **Respondent** field.
   b. Enter the primary attorney's name in the **Primary Attorney** field and that attorney's **Bar Number** in the indicated field.
   c. Enter the **Short Title** of the case, normally the last name, any suffix, first name and middle initial of the **Petitioner** on the first line, then press the **Enter** key and enter the last name, first name and middle initial of the **Respondent** on the second line. For instance, "John K. Smith III" should be entered as "Smith III, John K."
3. In the section labeled **Is Declarant's Address Confidential?,** click the appropriate answer.
4. In the **Court Information** section, click the **Edit Court Information** button. Enter the case number, county, branch, street and mailing address. The address fields are normally completed automatically depending upon county and branch entries.

When you have completed the **General Form**, click the **Save and Continue** or the **Save and Close** button to save your work to this point.

Children Form

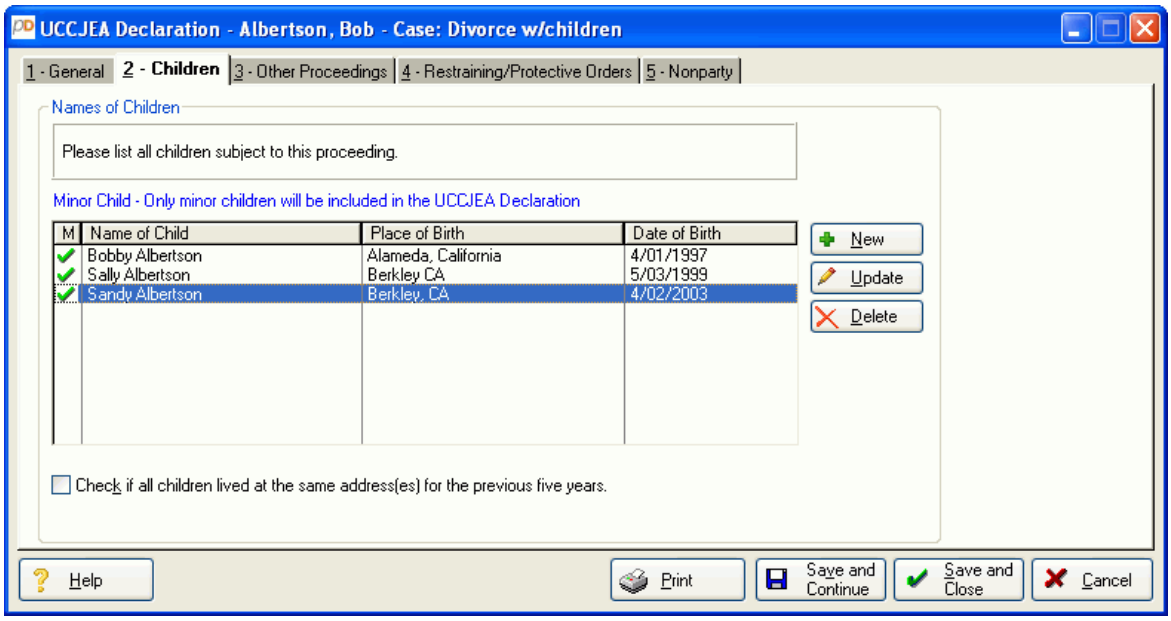


Figure 3, Children Form

The **Children Form** lists the children that are affected by the proceeding. You can enter the current address of each child, as well as the five year residential history of each child. We suggest you enter the oldest child's name and information first, as the initial child.

This topic contains specific help on **Children Form** entries and an overview of the process of completing related windows. For detailed help on the windows you use while completing the **Children Form**, click the **Help** button on each window. To see help for the windows in this manual, click the links in this section or continue scrolling to see help for the windows in the order that the windows appear.

Adding Children's Names
To add the names of minor children to the Names of Children section of the **Children Form**::

1. Click on the **Check if all children lived at the same address(es) for the previous five years** checkbox if the statement applies.
   a. If this box is checked, any child entered after the initial child will automatically list the same addresses as the initial child.
   b. If you uncheck the **Check if all children lived at the same address(es) for the previous five years** checkbox, you will need to enter the addresses for each child separately.
2. Click the **New** button. You can also right-click anywhere inside the list box and click **New** on the menu that appears.
3. The **Adding Child's Address Information** 132 window appears. Complete the name, date of birth and place of birth of the initial child. To add another child's name, press the **Next Child** button. After the last child's name is entered, press the **OK** button.
4. The **Adding Child's Address** 134 window appears. Use it to enter the most current address for the initial child, then click the **New** button on the right side of the window and enter the name of the person the child lived with, and their relationship to the child. Click the **OK** button when you are finished.
5. If more addresses are necessary to complete a five year history, click the initial child's name and

click the **Update** button. Repeat steps 4 and 5 to enter the next most recent address information and information on whom the child lived with for the past five years. When the history is complete, click the **OK** button.

6. Repeat the process above to enter other children. When you are finished, click the **Save and Continue** button or **Save and Close** button as desired to save your work up to this point.

To update a child's information, do any one of the following to open a window to update the information:

- Double-click the child's name.
- Right-click the child's name and click **Update** on the menu that appears.
- Click the name and click the **Update** button.

The **Changing Child's Address Information** 134 window will appear. Edit the information as desired and click **OK** to return to the **Children Form**.

To delete a child from the listing, click the child's name and click the **Delete** button, or right-click the child's name and click **Delete** on the menu that appears. On the confirmation window that appears, click **Yes** to delete the child or **No** to return to the **Children Form** without deleting the child.

Adding/Changing Child's Information

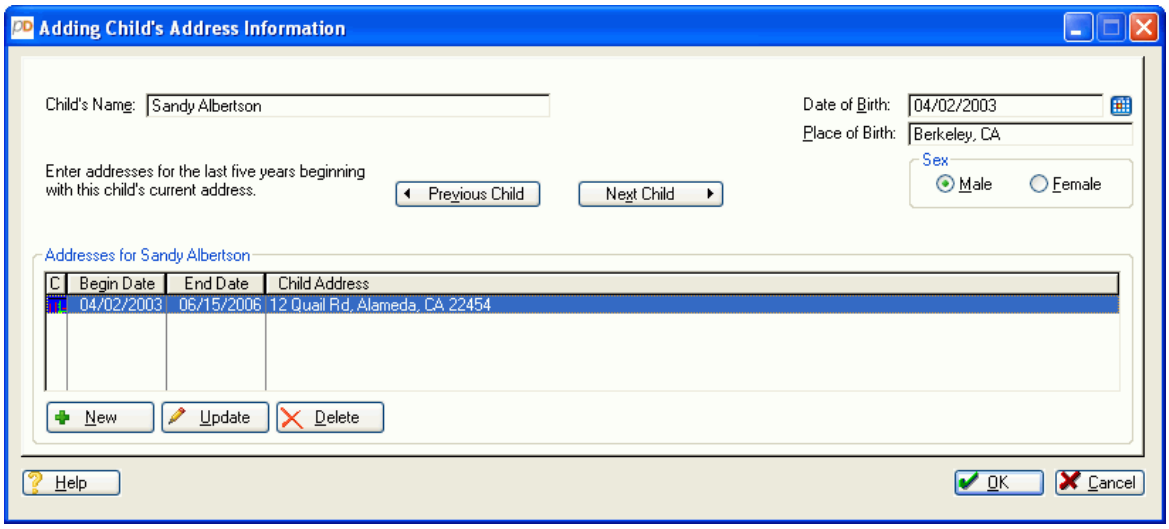


Figure 4, Adding Child's Address Information Window

This window is used to add a child and the child's residential history to the **Children Form** or to update the information on an existing child. When changing an address of a child, the title of the window will be **Changing Child's Address Information**. Figure 16 depicts the window when it is used to add a child's information. To complete the entries on this window:

1. Enter a **Child's Name.**
2. Enter the child's **Date of Birth** in mm/dd/yyyy format, or click the calendar icon and choose the date with the **Select a Date** 140 window.
3. Enter the child's **Place of Birth** (City, State).
4. In the **Sex** section, click the appropriate radio button for **Male** or **Female.**
5. Click **New** to add the current address of the child or add additional addresses. To update/edit an entry, either double-click the entry or click it and click the **Update** button.
6. The **Adding Child's Address** 134 window appears (if updating an address, the window title will be **Changing Child's Address**).

7. Enter the **Begin Date** and **End Date** in the corresponding fields, or click the calendar icon and choose the date with the **Select a Date** 140 window.
8. If you want to keep any addresses confidential, click the box labeled **Address Confidential.** You will need to complete the **City** and **State** fields at a minimum. If desired, you can enter all address fields. If the box is checked, these fields will be displayed on your declaration as follows, regardless of whether or not you enter the street address and zip code:
   a. Most current address: your printed declaration will only show "Address Confidential" for that address.
   b. Other addresses: your printed declaration will show "Address Confidential" as the street address, and it will also display the entered city and state.
9. Enter the child's addresses for the past five years in the **Street, City, State** and **Zip** fields. You can also click the browse button next to the **Street** field to choose previously entered addresses.
10. On the right side of the window, click the **New** button to add the current address of each person the child lived with during the time span. The **Current Address** 135 window appears. You can click the **Available Persons** button to quickly copy information for persons you've already entered into the program, or type the entries in the fields.
    a. To keep this person's current address confidential, check the **Address Confidential** box, then complete the mandatory **Person Lived With** and **Relationship** fields. If desired, enter the address fields. Whether or not you enter the address, it will be displayed on your printed declaration as **Address Confidential.**
    b. If there is no need to keep the address confidential, leave the **Address Confidential** box unchecked and complete all entry fields. If the **Address Confidential** box is not checked, the full address will be displayed on your printed declaration.
    c. Click the **OK** button, or click the **Cancel** button to close the window without saving your entries.
11. If you want to add more addresses for the child, click the **Add Another** button.

When you finish entering the addresses, click **OK.** Click **Cancel** to close the window without saving your entries.

Button Descriptions and Functions

Previous Child - Click this button to display the window's information for the previous child on the list. You can now add, update or delete addresses for this child. If you are currently working with the first child on the list, this button will be disabled.

Next Child - Click this button to display the window's information for the next child on the list. You can now add, update or delete addresses for this child. If you are currently working with the last child on the list, a dialog window will appear to ask if you wish to add another child. Click **Yes** to do so or **No** to close the window.

New - Click this button to add an address for the listed child. This choice also appears if you right-click anywhere inside a list box.

Update - Click this button to update an address for the listed child. You can also double-click an address entry to update it. This choice also appears if you right-click a child's address entry.

Delete - Click this button to delete the highlighted address for the listed child. This choice also appears if you right-click a child's address entry.

OK - Click this button to enter the information on the **Children Form** and close the window.

Cancel - Click to close the window and return to the **Children Form**. Your entries will not be saved.

Child's Address

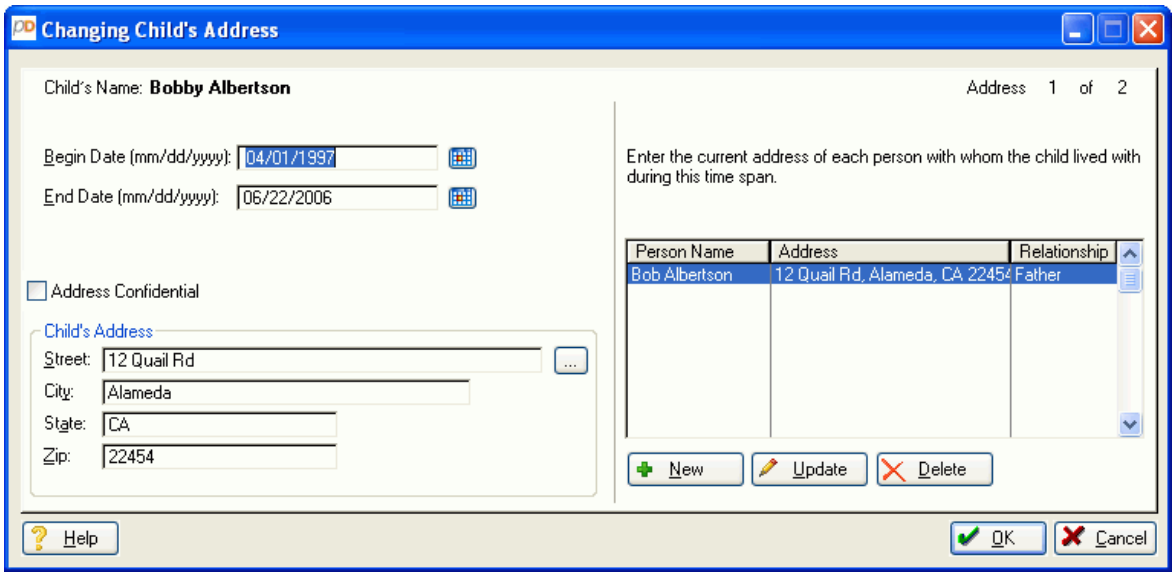


Figure 5, Changing Child's Address Window

This window is used to add an address for a child or update an existing address. You should enter addresses for the past five years, beginning with the most current.

1. Enter the **Begin Date** and **End Date** in the corresponding fields, or click the calendar icon and choose the date with the **Select a Date** 140 window. If you are adding the **first** entry (current address) for a child, the **End Date** field will contain the current date.
2. If you want to keep any addresses confidential, click the box labeled **Address Confidential.** You will need to complete the **City** and **State** fields at a minimum. If desired, you can enter all address fields. If the box is checked, these fields will be displayed on your declaration as follows, regardless of whether or not you enter the street address and zip code:
   a. Most current address: your printed declaration will only show "Address Confidential" for that address.
   b. Other addresses: your printed declaration will show "Address Confidential" as the street address, and it will also display the entered city and state.
3. Enter the child's address in the **Street, City, State** and **Zip** fields. You can also click the browse button next to the **Street** field to choose any previously entered address.
4. On the right side of the window, click the **New** button to add the current addresses of each person the child lived with during the time span. If you need to update an existing entry, double-click the entry, or click it and click the **Update** button. The **Delete** button deletes the highlighted entry.
5. The **Current Address** 135 window appears. You can click the **Available Persons** button to quickly copy information for persons you've already entered into the program, or type the entries in the fields.
   a. To keep this person's current address confidential, check the **Address Confidential** box, then complete the mandatory **Person Lived With** and **Relationship** fields. If desired, enter the address fields. Whether or not you enter the address, it will be displayed on your printed declaration as **Address Confidential.**
   b. If there is no need to keep the address confidential, leave the **Address Confidential** box unchecked and complete all entry fields. If the **Address Confidential** box is not checked, the full address will be displayed on your printed declaration.

c. Click the **OK** button, or click the **Cancel** button to close the window without saving your entries.

6. If you want to add more addresses for the child, click the **Add Another** button.

When you finish entering addresses, click **OK** to return to the **Adding/Changing Child's Address Information** window. Click **Cancel** to close the window without saving your entries.

Person Child Lived With

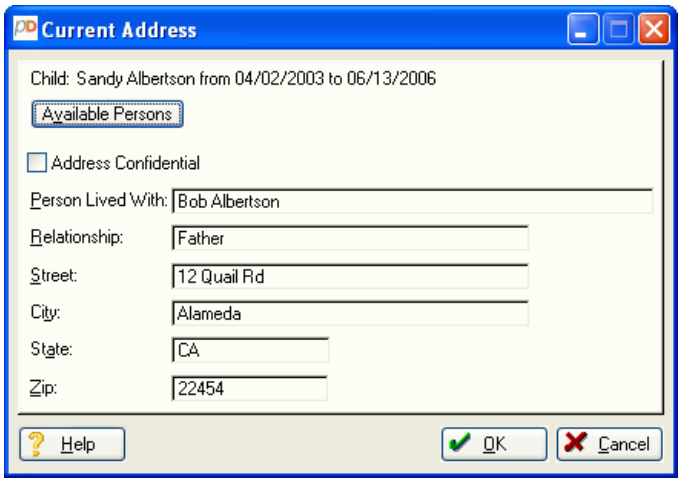


Figure 6, Current Address Window

This window is used to add a person who lived with the child during a particular time span. It also allows you to update a previous entry. To complete the entries on this window:

1. You can click the **Available Persons** button to quickly copy information for persons you've already entered into the program, or type the entries in the fields if the person's information has not yet been entered.
2. To keep this person's current address confidential, check the **Address Confidential** box, then complete the mandatory **Person Lived With** and **Relationship** fields. If desired, enter the address fields. Whether or not you enter the address, it will be displayed on your printed declaration as **Address Confidential.**
3. If there is no need to keep the address confidential, leave the **Address Confidential** box unchecked and complete all entry fields. The person's **current** address information should be entered. If the **Address Confidential** box is not checked, the full address will be displayed on your printed declaration.
4. Click the **OK** button, or click the **Cancel** button to close the window without saving your entries.

NOTE: If the person with whom the child lived is your client and you change the person's name or address here, you should make the same changes to the client's information in the Client/Case Manager. There is a possibility that your client will be listed twice in the available persons list if you enter information that is different from the information entered in the Client/Case Manager.

Other Proceedings Form

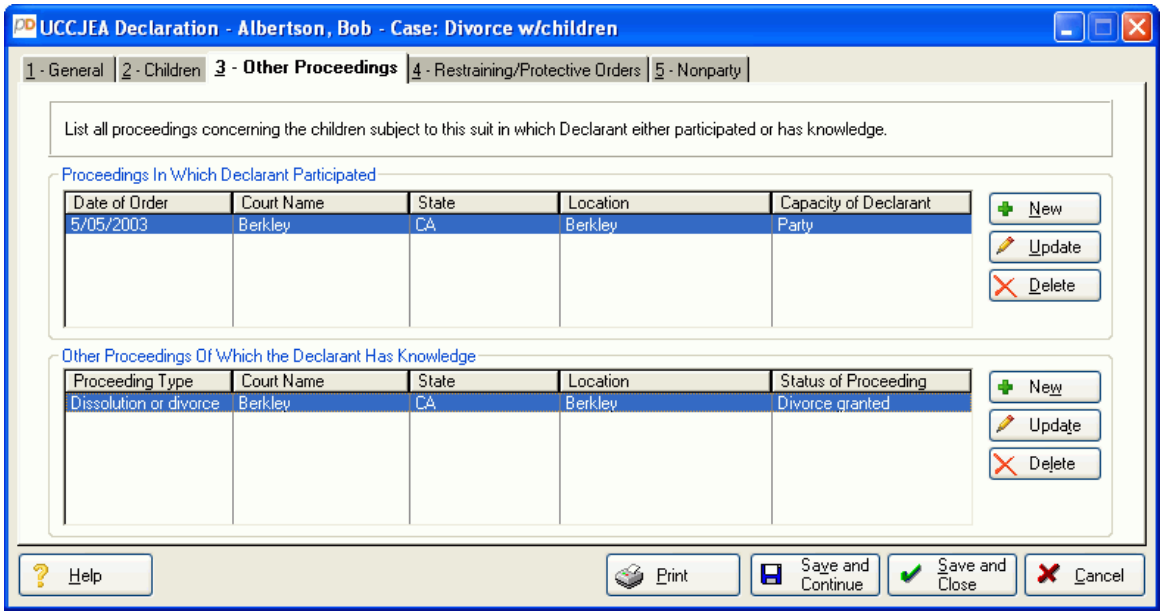


Figure 7, Other Proceedings Form

The **Other Proceedings** form lists other relevant proceedings concerning the child(ren) affected by this suit in which the Declarant was involved, either by participation or by knowledge.

To add (or update) other proceedings in which the declarant participated and which concerns a child subject to the instant proceeding:

1. Click the **New** button in the upper section of the window to add a proceeding. To update/edit an entry, double-click an existing entry or click it and click the **Update** button.
2. The **Proceedings in Which Declarant Participated** window appears.
3. Complete the **Capacity of Declarant**, **Court**, **State** and **Location** fields.
4. If a child custody determination has been made, enter or select the date of the order or judgment in the **Date of Order/Judgment** field.
5. Select the children affected by the proceeding.
6. Click **OK** to return to the **Other Proceedings** form.

To delete a proceeding, click the proceeding and click the **Delete** button. On the confirmation window that appears, click **Yes** to delete the proceeding or **No** to close the window without deleting the proceeding.

To add (or update) other proceedings concerning the child(ren) in which the declarant has knowledge:

1. Click the **New** button in the lower section of the window to add a proceeding. To update/edit an entry, double-click an existing entry or click it and click the **Update** button.
2. The **Other Proceedings of Which the Declarant has Information** window appears.
3. Complete the **Nature of Proceeding**, **Court**, **State** and **Location** fields.
4. Enter the **Status of Proceeding.**
5. Select the children affected by the proceeding.
6. Click **OK** to return to the **Other Proceedings** form.

When you are finished entering information on the **Other Proceedings** form, click the **Save and Continue** button or the **Save and Close** button to save your work to this point.

Restraining/Protective Orders Form

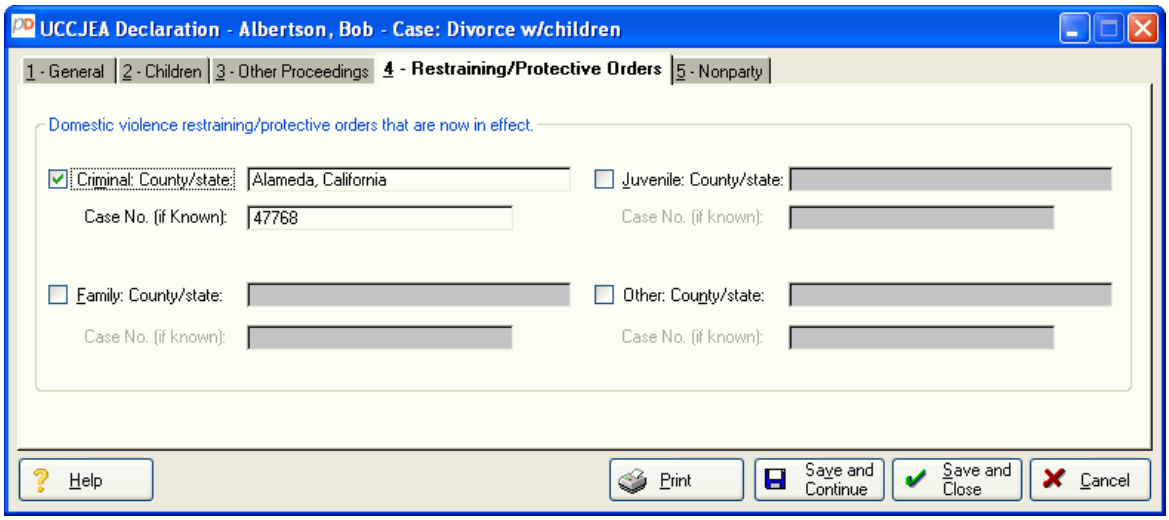


Figure 8, Restraining/Protective Order Form

The **Restraining/Protective Orders** form allows you to enter information on any domestic violence orders that are now in effect and have an affect on the case at hand. To complete the form, click the appropriate check box to indicate the type of court that issued the order **(Criminal, Juvenile, Family or Other).** The entry fields for the particular type of court will activate. Enter the **County/state** where the order was issued. If known, enter the **Case No.** for the case associated with the order.

Nonparty Form

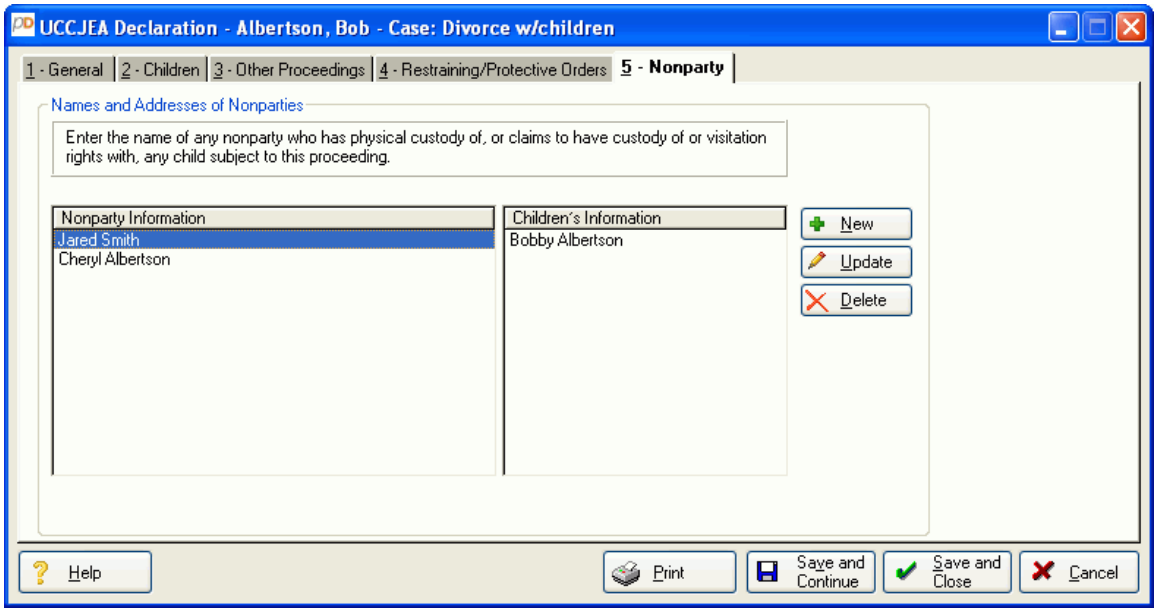


Figure 9, Nonparty Form

The **Nonparty** form helps you enter the name and address of nonparties who may have actual physical custody of the child(ren) or are claiming visitation or custody rights of the child(ren) subject to the action.

To enter the nonparty claiming actual physical custody, visitation or custody rights of the child(ren)

subject to the action:

1. Click **New.** The Adding Nonparty Information 138 window appears.
2. Enter the nonparty's name or select it by clicking the **Available Persons** button and making your selection from the **Select a Person** window.
3. In the **Type of Claim** section, click the appropriate entry (or entries) to describe the nonparty's type of claim: **Has Physical Custody, Claims Custody Rights** or **Claims Visitation Rights.**
4. Enter the nonparty's address in the **Address** section. If you selected the party with the **Available Persons** button, the address you entered previously is automatically entered. In the **Check Affected Children** section, select each child affected by clicking the appropriate name. You can also click a selected name to clear the selection.
5. Click **OK** to return to the **Nonparty** form.
6. Repeat the process to add other nonparties. When you are finished, click the **Save and Continue** button or the **Save and Close** button to save your work to this point.

To update/edit a nonparty entry, double-click the name or click the name and click the **Update** button. Use the procedures above to edit the information.

To delete a nonparty from the listing, click the name and click the **Delete** button. On the confirmation window that appears, click **Yes** to delete the nonparty or **No** to return to the **Nonparty** form without deleting the nonparty.

Adding or Changing Nonparty Information

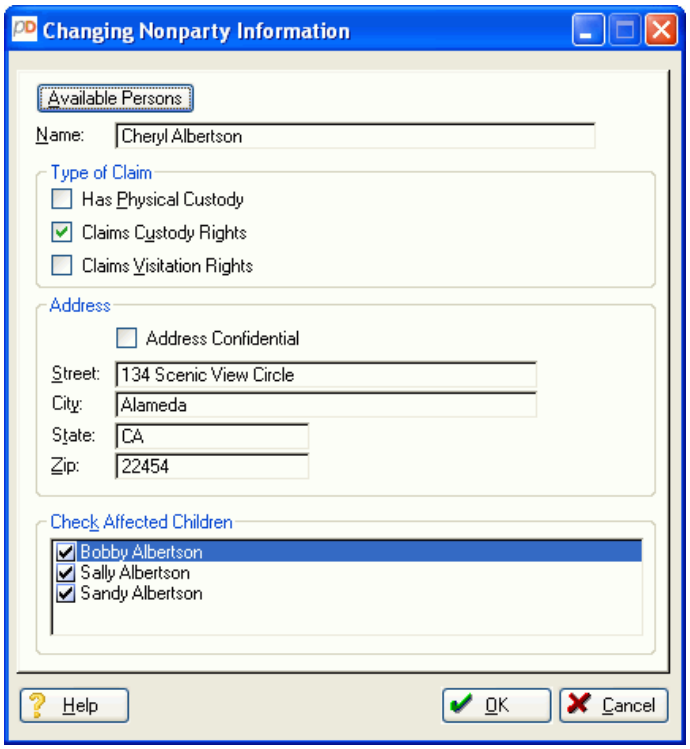


Figure 10, Changing Nonparty Information Window

This window allows you to add or update a nonparty's information.

1. Enter the nonparty's name or select it by clicking the **Available Persons** button and making your selection from the **Select a Person** window.
2. In the **Type of Claim** section, select whether the nonparty **Has Physical Custody, Claims**

Custody Rights or **Claims Visitation Rights** by clicking the appropriate checkbox.

3. If you want to keep the address confidential, click the box labeled **Address Confidential.** If this box is checked, only "Address Confidential" will be printed on the declaration instead of any address information you enter.
4. Enter the nonparty's address in the **Address** section. If you selected the party with the **Available Persons** button, the address you entered previously is automatically entered.
5. In the **Check Affected Children** section, click the name of the children who are affected. You can also click a selected name to clear the selection.
6. Click **OK** to return to the **Nonparty** form. Click **Cancel** to close the window without saving your entries.

Other Windows

Selecting a Case

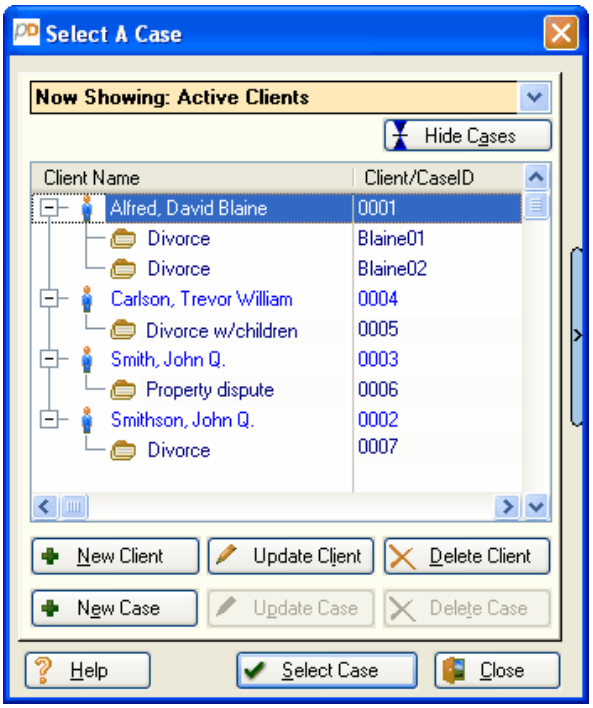


Figure 11, Select a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input. It lists existing ProDoc clients and all cases for the clients. You can use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click on a displayed case and then press the **Enter** key.
- Click on a displayed case and then click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients**. Other choices are **All Contacts, Closed Contacts, Private Clients** and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

Select a Date Window

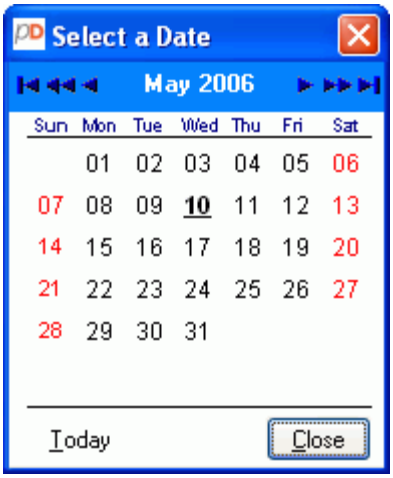


Figure 12, Select a Date Window

This window helps you quickly complete date fields. Tools and buttons on this calendar tool, depicted as Figure 12, include:

- and - Click to move back or forward one year.
- and - Click to move back or forward one month.
- and - Click to move back or forward one week.
- Use **Up** and **Down** arrow keys to move back and forward one week.
- Use **Left** and **Right** arrow keys to move back and forward one day.
- Click **Today** to move the underline/highlight to today's date.
- Click on the date to choose it or press the **Enter** key to choose the underlined date.
- Click **Close** to close the calendar without choosing a date.

California Guardianship Inventory & Appraisal

Getting Started

It's easy to create inventories for your guardianship matters with the **Guardianship Inventory & Appraisal** program. This program completely eliminates manual calculations, simplifies your work and dramatically reduces the time necessary to handle guardianship matters. You need to only list the necessary information once. ProDoc automatically calculates the value of the estate and prints the required form and attachments.

Starting the Program

1. Click **PowerPacks →Guardianships → Inventory & Appraisal.**
2. The **Select a Case** 160 window opens. Select a case by double-clicking a visible case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button. Click the **Help** button on the window or click **here** 160 for detailed help for finding and selecting cases.
3. The **Guardianship Inventory & Appraisal** program opens to the **General** tab.

Navigating the Guardianship Inventory & Appraisal Program

There are six tabs across the top of the main program window: **General** 142, **Minor** 144, **Community Property** 146, **Separate Property** 148, **View Attachment 1** 150, and **View Attachment 2** 151. Each tab represents a different form. To move from one screen to another, position the cursor over the tab you want to use and click on it.

You can also use hot keys. Wherever a window, screen or field title shows an underlined character, For Example, "**Primary Attorney**", you can navigate to that entry by holding the "**Alt**" key and pressing the underlined keyboard character. In the earlier example, pressing **Alt + A** on your keyboard puts your cursor in the **Primary Attorney** field.

Help with using the Guardianship Inventory & Appraisal Program

- Click the **Help** buttons on each window (or press the **F1** key).
- View or print the **ProDoc Software Manual.**
- View Computer Based Training (CBT) Modules at the **ProDoc Website.**
- Periodic ProDoc user seminars; schedule these at the **ProDoc Website.**
- Call our Customer Support specialists at 1-800-759-5418.
- Send email to **tech@prodoc.com.**

Main Toolbar

Figure 1, Main Toolbar

The toolbar along the bottom of each of the six major forms consists of the **Help**, **Copy Property To**, **Print**, **Send to Excel**, **Save and Continue**, **Save and Close**, and **Cancel** buttons. This toolbar is always available while you are using the program. The buttons and their actions are discussed below.

Help - Click this button to display the help topic for the form or current window.

Copy Property To - Click this button to copy property data from the current minor to another minor with whom you wish to share the data. A box opens entitled **Minor Selection**, listing the names of all

minors. Select the name of the minor(s) to whom you want to copy assets.

To copy a single asset to another minor, select an asset on the current form, right-click on the asset and select the minor to receive the asset.

Print - Click this button to print and/or preview form GC-040, Inventory & Appraisal, and form GC-041 attachment forms. A box opens entitled, **Minor Selection**. Accept the selection of **All** or select only the names of minor(s) for whom you want to print inventories.

Send to Excel - Click this button to send all categories and amounts entered in the program to an Excel spreadsheet. A box opens titled, **Minor Selection**. Accept the selection of **All** or select only the names of minor(s) for whom you wish to export inventory data to Excel spreadsheets.

Save and Continue - Click this button to save the data that has been entered and continue working with the program.

Save and Close - Click this button to save the data that has been entered and exit the program.

Cancel - Click this button to exit the program without saving the information that you entered during the current session.

General Form

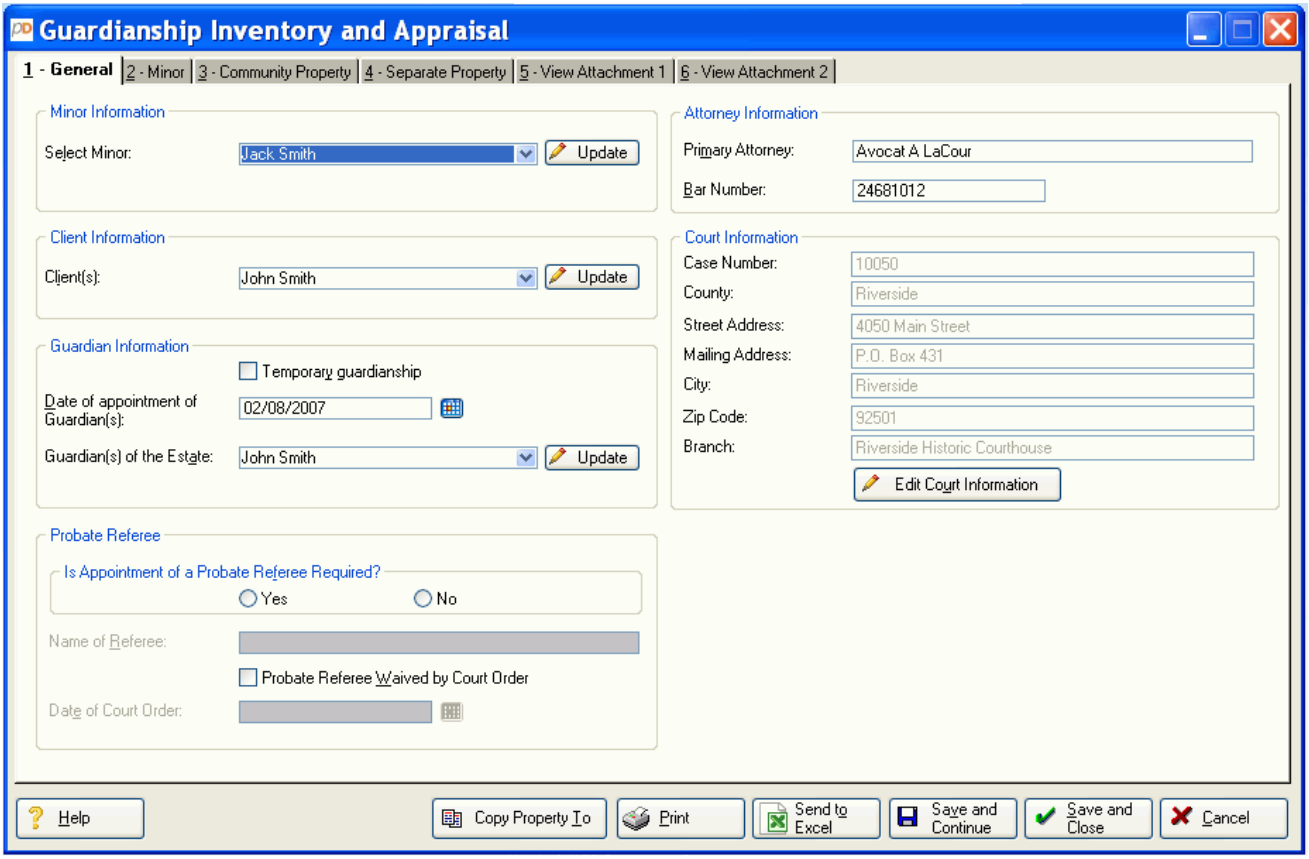


Figure 2, General Form

The **General Form** is used to enter information about the minor children, the client(s), guardian(s), referee, primary attorney, and court.

Navigating through the General Form

To navigate from one field/button to another, click on the field or button you would like to use. You can also press the **Tab** key on your keyboard to move forward to the next entry and press **Shift + Tab** to move to the previous entry.

Completing the General Form

Select Minor - Press the **Update** button. The **Minor Names** popup window opens and you are prompted to **Add/Change Minor Name and Alias**. You can create a separate inventory for each minor. Use the **New**, **Update,** or **Delete** buttons to add, edit, or delete minor names.

Alias - Enter any other names by which a minor may be known.

Client(s) - To edit the client(s) list for the case, click the **Update** button in the **Client Information** section. The **Client Names** window appears.. Use the **New**, **Update,** or **Delete** buttons to add, edit, or delete client names. The option to update or delete a client's name will not be available if the client is in your ProDoc database; you must use the **Client/Case Manager** for this. For specific help for these windows, click the **Help** button on each window.

Date of Appointment of Guardian(s) - Enter the date in mm/dd/yyyy format. You can also click the calendar icon to select the date from a calendar tool. Click **Select a Date** 161 for detailed help with this tool. If the guardianship appointment is temporary, click the **Temporary guardianship** box.

Guardian(s) of the Estate - To edit the guardians list for the case, click the **Update** button. The **Guardian Names** popup window opens where you are prompted to **Add or Update the List of Guardians.**

Probate Referee Section - Enter the requested information for the **Probate Referee** if one is required.

- **Is Appointment of a Probate Referee Required? -** Click the appropriate **Yes** or **No** button.
- If **Yes** was selected, enter the name of the probate referee in the **Name of Referee** field.
- If you checked the box for **Probate Referee Waived by Court Order**, enter the **Date of Court Order** in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** 161 calendar tool.

Attorney Information Section - Enter the **Primary Attorney's** name and **Bar Number** in the fields provided.

Court Information Section - Click the **Edit Court Information** button to open the **Court Information** window. Enter the **Case Number** and choose the **County** and **Branch.** The **Street Address, Mailing Address, City** and **Zip Code** should be automatically completed for you, depending upon your previous selections. If not, enter the information in the fields provided. Click the **Save** button when you are finished to return to the **General Form**.

When you are finished entering the information on the **General Form**, click the **Save and Continue** button to save your entries and continue working, or click the **Save and Close** button to save your entries and close the **Guardianship Inventory & Appraisal** program.

Minor Form

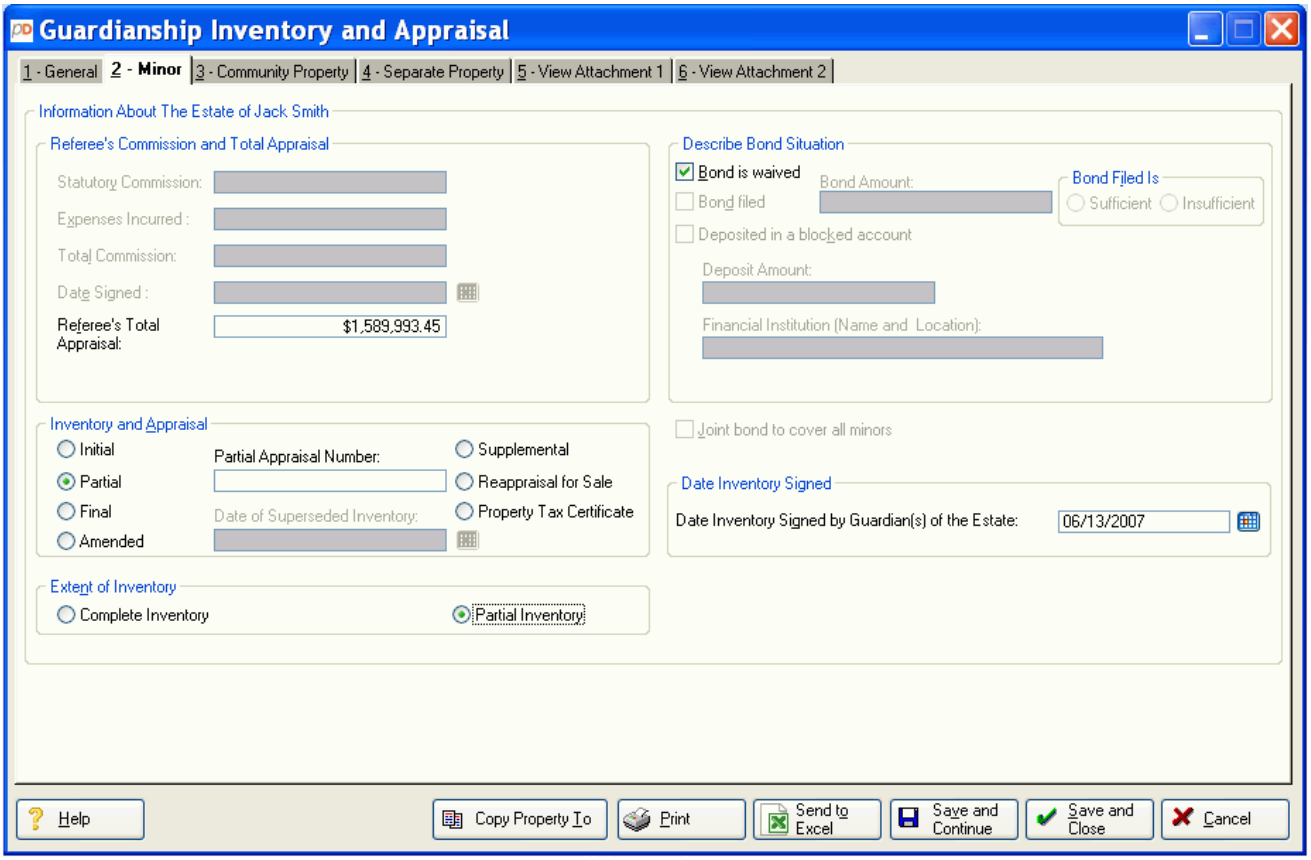


Figure 3, Minor Form

The **Minor Form** is used to enter all basic information about the referees commission, type and extent of inventory and appraisal, bond situation, and date inventory was signed by the guardian of the estate.

Navigating through the Minor Form

To navigate from one field/button to another, click on the field or button you would like to use. You can also press the **Tab** key on your keyboard to move forward to the next entry and press **Shift + Tab** to move to the previous entry.

Completing the Minor Form

Descriptions of entry fields and choices required for this form are listed below.

Referee's Commission and Total Appraisal Section

The fields will be subdued and you will not be able to enter data in this section if data entered in the General Form indicates that a probate referee is not required or is waived by court order.

- Enter the **Statutory Commission** paid to the probate referee.
- Enter the **Expenses Incurred** by the probate referee.
- The computer calculates and completes the **Total Commission** field.
- Enter the **Date Signed** in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** 161 calendar tool.

- Enter the amount provided by the probate referee for the **Referee's Total Appraisal** field for Attachment 2 property. The amount you enter here will be printed in the applicable field on the GC-040 form. If the amount entered differs from the amount calculated from your asset entries, you will be notified when you print the form.

Inventory and Appraisal Section - Click the appropriate button to indicate whether the inventory is **Initial**, **Partial**, **Final**, or **Amended**.

- Select **Initial** if this is the first inventory and appraisal completed since becoming guardian.
- If you select **Partial,** the **Partial Appraisal Number** field is activated. Enter a numeral representing the serial number of the appraisal (i.e. "1", "2").
- Select **Final** if this is your final inventory and appraisal.
- If you select **Amended,** the **Date of Superseded Inventory** field is activated. Enter the date of the superseded inventory.
- If you select **Supplemental**, it should only contain new information. (For example, to correct the omission of one or several items that were omitted in the final inventory and appraisal.)
- Select **Reappraisal for Sale** if real property is being sold more than one year after the date of appointment of the guardian.
- Select **Property Tax Certificate** if the minor owned California real property and the property change of ownership certificates have been filed as required. (If the minor owned no California real property on the date of appoiintment, this button should **not** be selected.)

Extent of Inventory Section. - Click on the appropriate button to indicate whether the inventory is a **Complete Inventory** or a **Partial Inventory**.

Describe Bond Situation Section - Click the appropriate button to describe the bond situation: **Bond is Waived**, **Bond Filed,** or bond is **Deposited in a Blocked Account.**

- If you choose **Bond is waived**, no further fields need to be completed in this section.
- If you choose **Bond Filed**, enter the amount in the **Bond Amount** field and click the appropriate button to indicate whether or not the bond amount is sufficient.
- If you choose **Deposited in a Blocked Account**, enter both the **Deposit Amount** and the name and location of the financial institution holding the deposit in the appropriate fields.

Joint bond to cover all minors - If a joint bond was filed on behalf of all minor's inventories, check the **Joint Bond to cover all minors** box.

Date Inventory Signed by Guardian(s) of the Estate - Enter the date the Inventory & Appraisal was signed by the guardian(s) of the estate in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** 161 calendar tool.

When you are finished entering the information on the **Minor Form**, click the **Save and Continue** button to save your entries and continue working, or click the **Save and Close** button to save your entries and close the **Guardianship Inventory & Appraisal** program.

Community Property Form

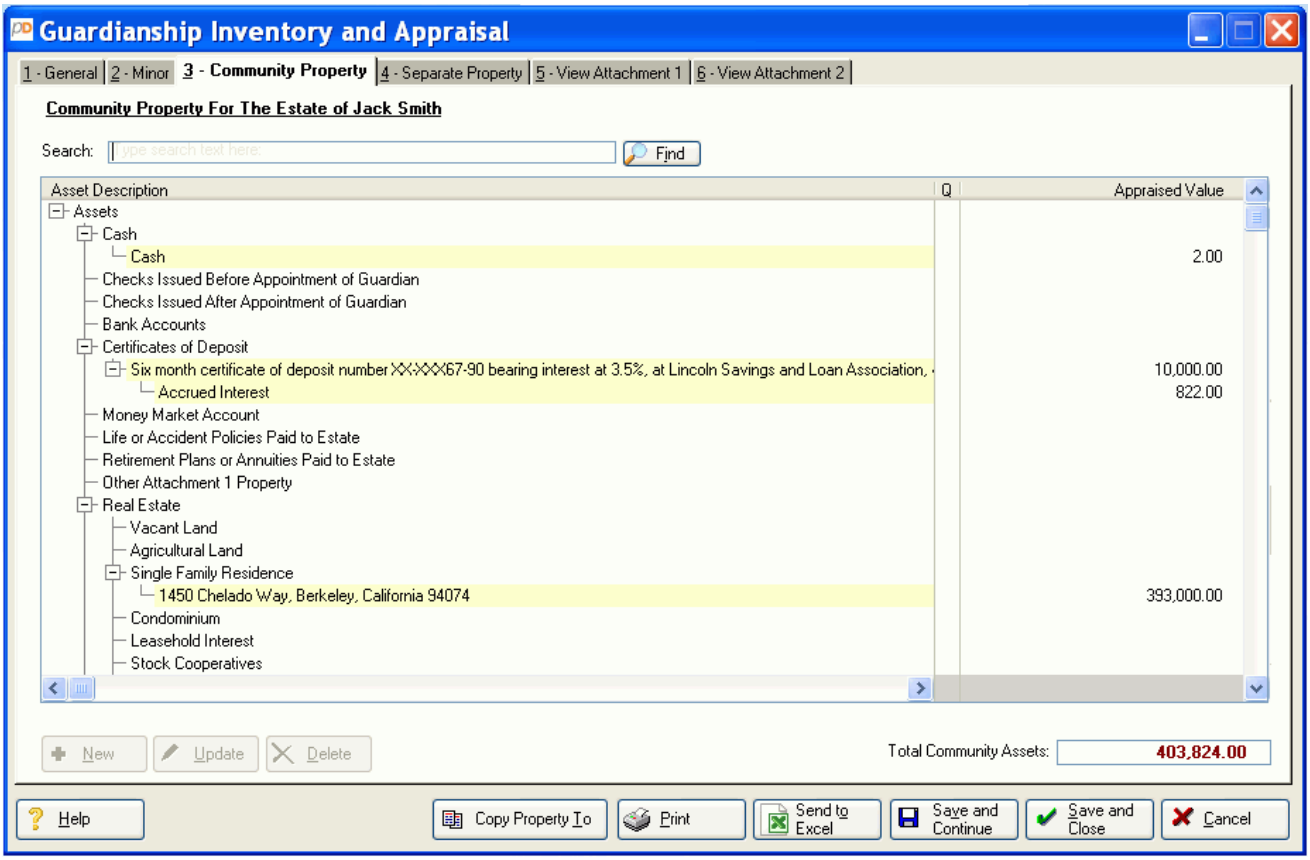


Figure 4, Community Property Form

The **Community Property Form** is used to enter details regarding estate community property.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets Are Displayed 146
Locating Asset Descriptions 146
Entering Assets 147
Using Toolbar Buttons 147

How Assets are Displayed

The information for each asset or property is displayed in three columns: **Asset Description**, **Q** (Quasi-Community Property, identified by a green check mark), and **Appraised Value.** As you enter assets, a running total is displayed under the listing, labeled **Total Community Assets.**

Entries of actual assets are highlighted in yellow.

To view all asset descriptions,move the vertical scroll bar on the right side of the screen. To view only the main title, **Assets,** in the **Asset Description** column, click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you

wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.

- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

NOTE: **This is a general overview of the steps to enter assets.** For specific help on various types of asset entries, click the **Help** button on each asset entry screen.

1. Double-click an asset description, right click a description and select **New Asset**, or click a description once and click **New**.
2. A window will appear titled with the description you chose. It will display the entry fields appropriate for the asset.
3. Complete the displayed fields for the asset. These will vary according to the type of asset you are entering.
4. Check the box if the asset is a Quasi-Community Property.
5. When you are finished, either click the **Add Another** button to enter another asset in the same category or click the **OK** button to return to the **Community Property** form. The descriptions and amounts will be listed here.
6. You may edit an entry by double-clicking it, or by clicking it and clicking the **Update** button on the toolbar.
7. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking an asset entry and clicking **Delete Asset**.
8. You may copy an entry to other minors by right clicking an entry and selecting **Copy Asset**. A **Minor Selection** window appears and you can select the minor(s) to whom you wish to copy the asset. Also, you may copy entire lists of assets to another minor by selecting **Copy Property To** on the toolbar.

Using Toolbar buttons to work with Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to an asset entry in the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Separate Property Form

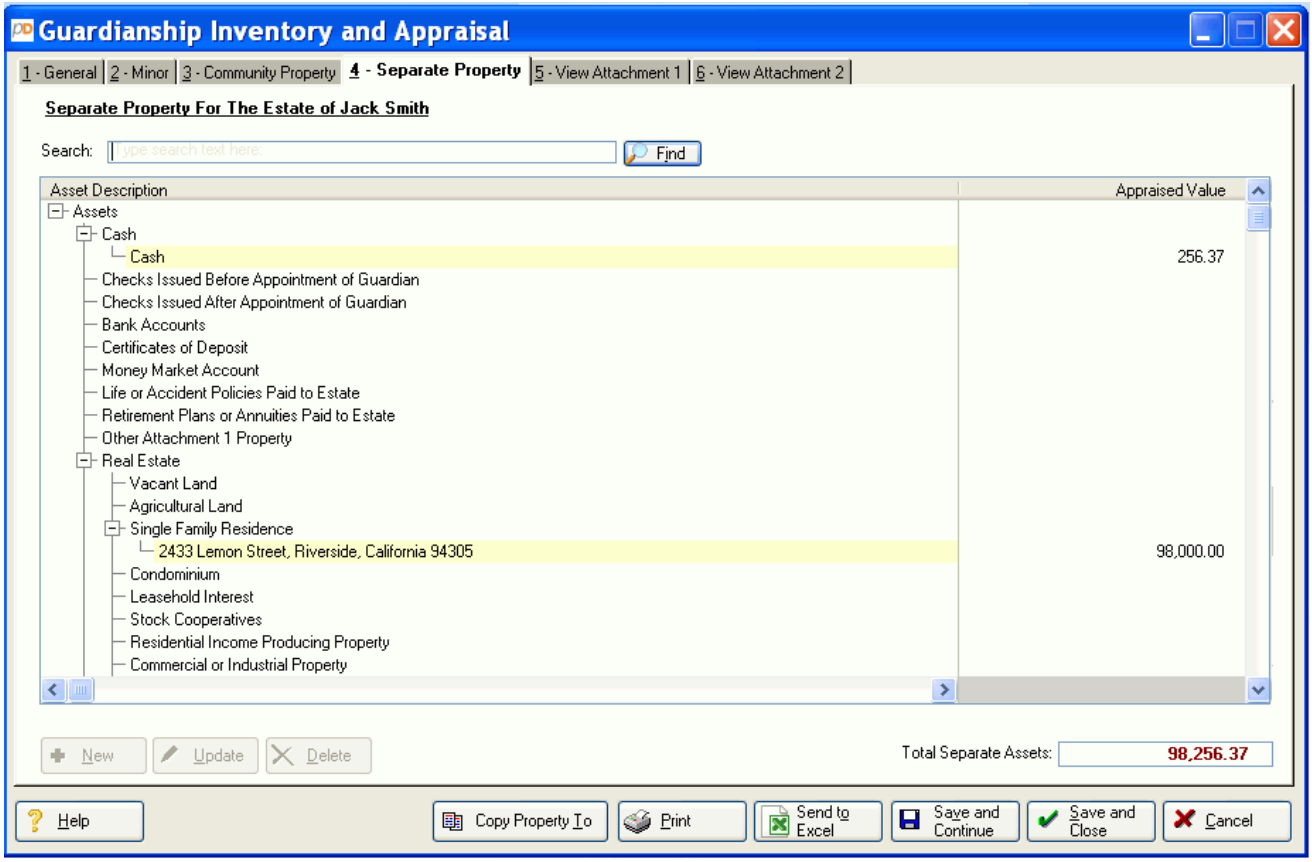


Figure 5, Separate Property Form

The **Separate Property** form allows you to enter details regarding the minor's separate property and the value of the property.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 148
Locating Asset Descriptions 148
Entering Assets 149
Using Toolbar Buttons 149

How Assets are Displayed

The information for each asset or property is displayed in columns: **Asset Description** and **Appraised Value**. As you enter assets, a running total is displayed under the listing, labeled **Total Separate Assets**.

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.

- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

NOTE: This is a general overview of steps to enter assets. For specific help on various types of asset entries, click the **Help** button on each asset entry screen.

1. Double-click an asset description, right click a description and select **New Asset**, or click a description once and click the **New** button on the toolbar.
2. A window will appear titled with the description you chose. It will display the entry fields appropriate for the asset.
3. Complete the displayed fields for the asset. These will vary according to the type of asset you are entering.
4. When you are finished, either click the **Add Another** button to enter another asset in the same category or click the **OK** button to return to the **Separate Property Form**. The descriptions and amounts will be listed here.
5. You may edit an entry by double-clicking it, by right-clicking a description and selecting **Update Asset**, or by clicking it and clicking the **Update** button on the toolbar.
6. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking an asset entry and clicking **Delete Asset**.
7. You may copy an entry to other minors by right clicking an entry and selecting **Copy Asset**. A **Minor Selection** window appears and you can select the minor(s) to whom you wish to copy the asset. Also, you may copy entire lists of assets to another minor by selecting **Copy Property To** on the toolbar.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value, and any other necessary information to an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

View Attachment 1 Form

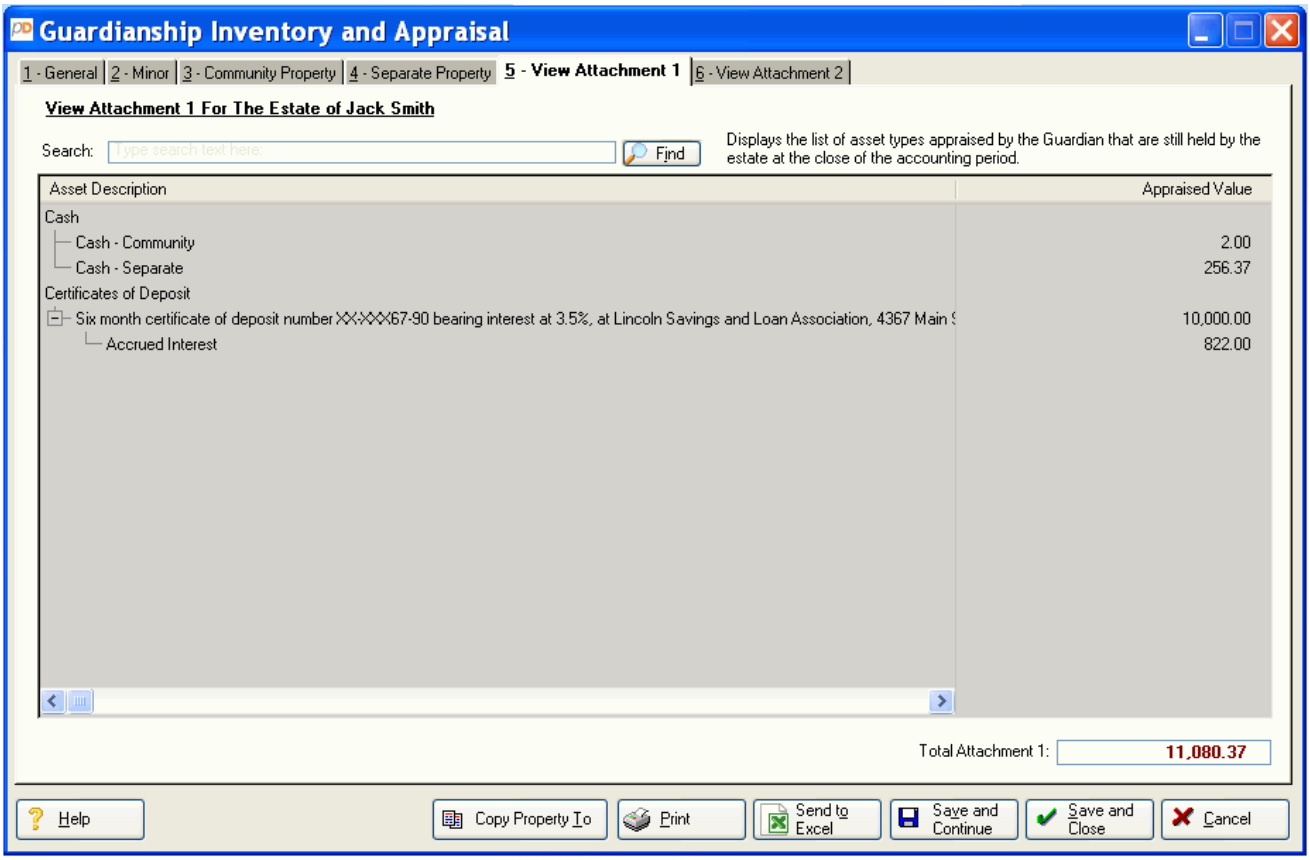


Figure 6, Attachment 1 Property Form

This form is completed automatically as you enter assets. It displays asset descriptions, appraised values and the total appraised value for the asset types appraised by the guardian that are still held by the estate at the close of the accounting period. You cannot edit entries on this form.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list if it is longer than the viewable area.
- Click on the top asset entry in the **Asset Description** column and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

View Attachment 2 Form

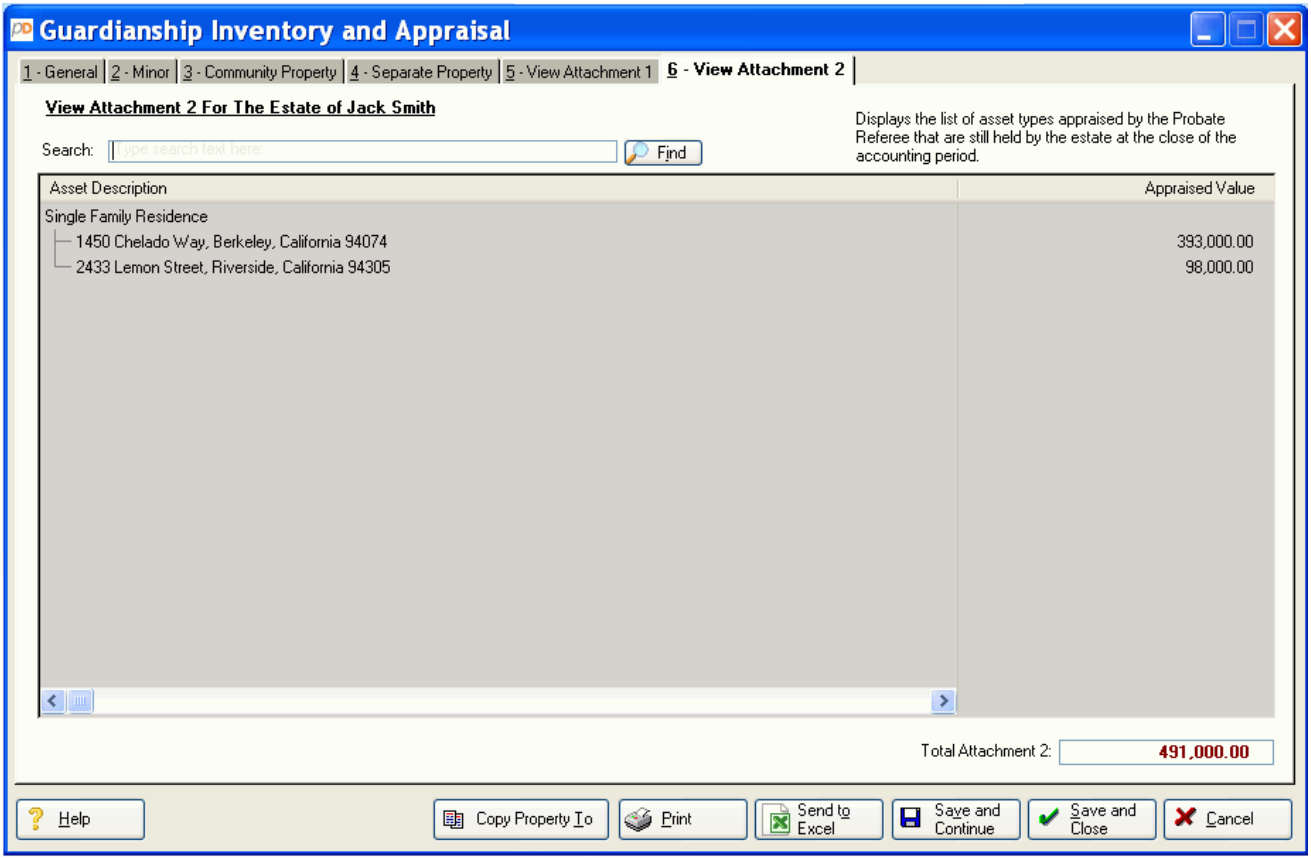


Figure 7, Attachment 2 Form

This form is completed automatically as you enter assets. It displays asset descriptions, appraised values and the total appraised value for the asset types appraised by the Probate Referee that are still held by the estate at the close of the accounting period. You cannot edit entries on this form.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list if it is longer than the viewable area.
- Click on the top asset entry in the **Asset Description** column and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset**

Description list.

Asset Description Categories

Attachment 1 Property Overview

Asset description categories which qualify as **Attachment 1 Property** are shown below. Since the entry fields vary considerably across these asset windows, please click the **Help** button on each asset window for detailed help with entering information for the asset.

Cash

Check Issued Before Appointment of Guardian

Check Issued After Appointment of Guardian

Bank Accounts

Certificates of Deposit

Money Market Account

Life or Accident Policies Paid to Estate in Lump Sum

Retirement Plans or Annuities Paid to Estate in Lump Sum

Other Attachment 1 Property

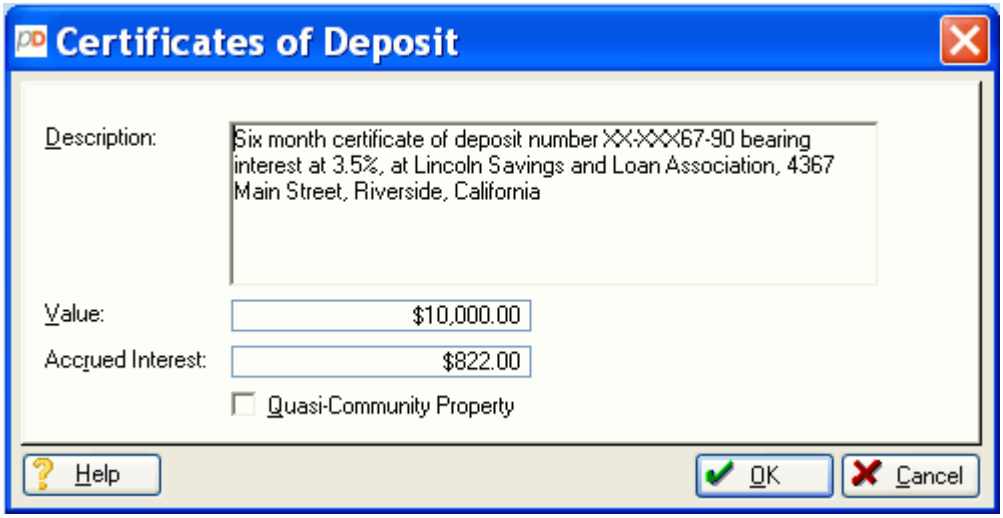


Figure 8, Certificate of Deposit

Button Descriptions and Functions

Help - Click this button to see help on completing specific asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Real Estate Overview

Asset description categories in the **Real Estate** listing are shown below. Click **Entering Asset Information** 153 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Vacant Land
Agricultural Land
Single Family Residence
Condominium
Leasehold Interest
Stock Cooperatives
Residential Income Producing Property
Commercial or Industrial Property
Life Estate
Remainder and Reversionary Interest
Time Share Interest
Other Real Estate

If a real estate asset doesn't fit into any other category, enter the asset in the **Other Real Estate** category.

Entering Asset Information. The asset description window opens with three fields for entering data: the **Property Address** field, the **Appraised Value** field, and the **Property Description** field. If you are entering assets on the **Community Property Form**, it also contains a check box for selecting Quasi-Community Property.

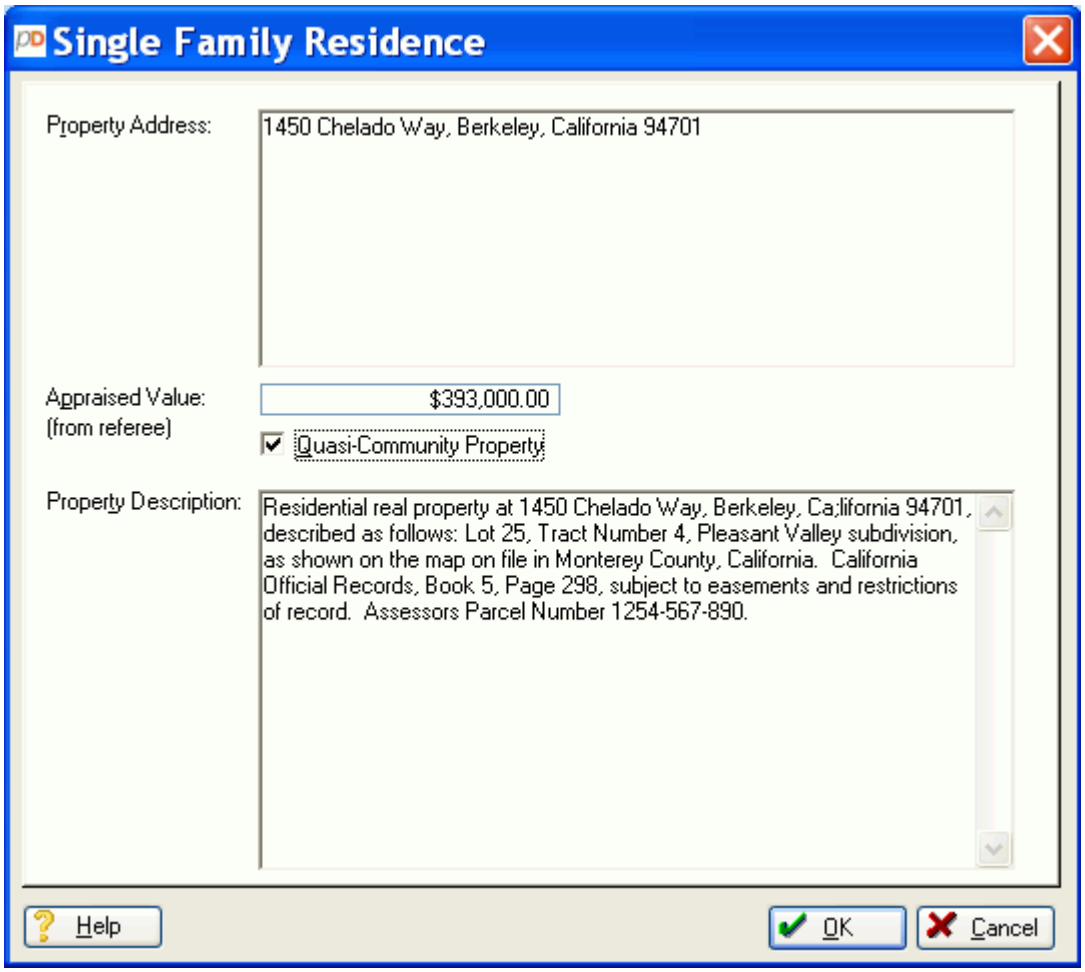

Single Family Residence
Property Address:
1450 Chelado Way, Berkeley, California 94701
Appraised Value:
(from referee)
$393,000.00
Quasi-Community Property
Property Description:
Residential real property at 1450 Chelado Way, Berkeley, Ca;lifornia 94701, described as follows: Lot 25, Tract Number 4, Pleasant Valley subdivision, as shown on the map on file in Monterey County, California. California Official Records, Book 5, Page 298, subject to easements and restrictions of record. Assessors Parcel Number 1254-567-890.
Help
OK
Cancel

Figure 9, Example Single-Family Residence

Click the **Help** button for detailed help with entering information for each asset.

Property Address - Enter the physical address of the property in line form (i.e., 12 Mockingbird Street, Berkeley, CA 94704).

Appraised Value (from referee) - Enter the referee-appraised value of the real estate or interest.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the real estate qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Property Description - Enter the complete legal description of the asset. Click the **Help** button to see a detailed description of the information required for the field.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Real Estate** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Business Interests Overview

Asset description categories in the **Business Interests** listing are shown below. Click **Entering Asset Information** 155 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Closely Held Corporation
Limited Partnerships
General Partnerships
Sole Proprietorships
Limited Liability Companies
Other Business

If a business asset doesn't fit into any other category, enter the asset in the **Other Business** category.

Entering Asset Information

The window used for business interests assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

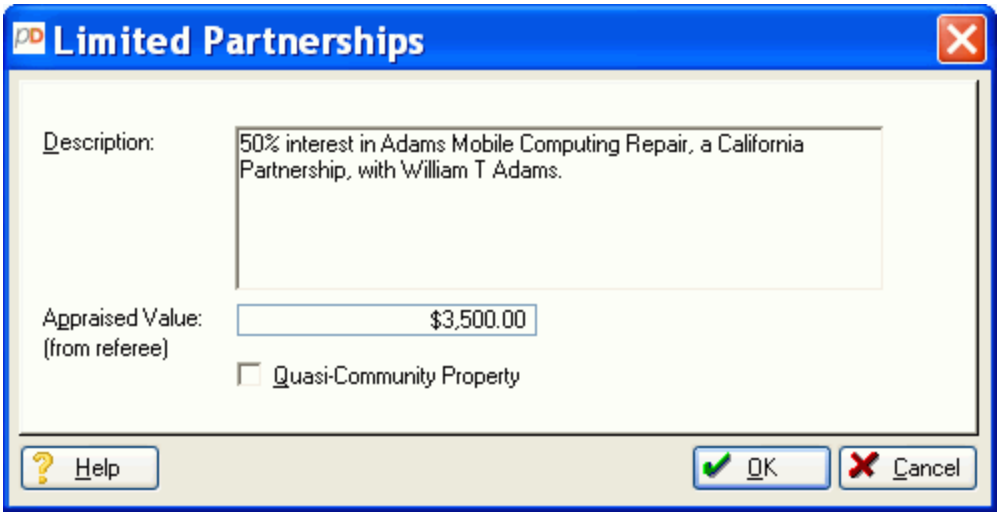


Figure 10, Limited Partnership Example

Description - Enter a description of the business interest. Click the **Help** button to see a detailed description of required entries for each business interest.

Appraised Value (from referee) - Enter the referee-appraised value of the business interest.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the business interest qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Business Interests** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information

to the **Guardianship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Tangible Personal Property Overview

Asset description categories in the **Tangible Personal Property** listing are shown below. Click Entering Asset Information 156 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Furniture, Furnishings and Miscellaneous
Jewelry
Coins or Stamps
Work of Art
Mobile Homes
Motor Vehicles
Boat, Airplane
Livestock and Breeding Animals
Other Personal Property

If a personal property asset doesn't fit into any other category, enter the asset in the **Other Personal Property** category.

Entering Asset Information

The window used for personal property assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

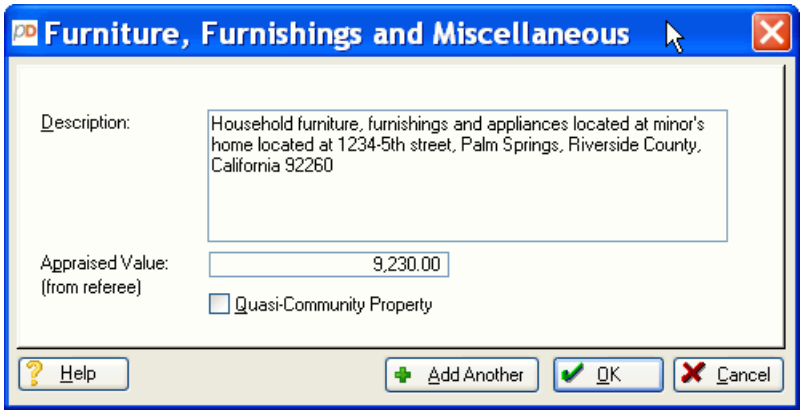


Figure 11, Example Tangible Personal Property Entries

Description - Enter a description of the property. Click the **Help** button to see a detailed description of required entries for each type of property.

Appraised Value (from referee) - Enter the referee-appraised value of the personal property asset.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the personal property asset qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Tangible Personal Property** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Debt or Promissory Notes Owed to the Minor

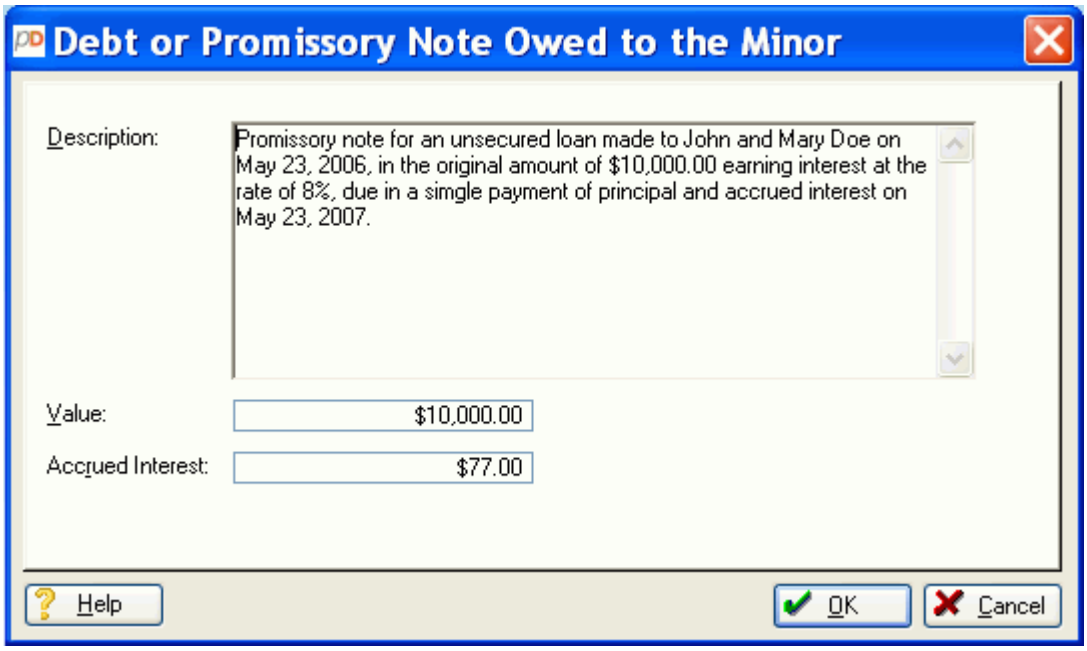

Debt or Promissory Note Owed to the Minor
Description:
Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original amount of $10,000.00 earning interest at the rate of 8%, due in a simgle payment of principal and accrued interest on May 23, 2007.
Value:
$10,000.00
Accrued Interest:
$77.00
Help
OK
Cancel

Figure 12, Debt or Promissory Note Owed to the Minor

To enter a debt or promissory note owed to the minor, or to update existing asset descriptions in this category, follow the steps below:

1. Enter a **Description** in the designated field. Include the terms of the note, such as the date of the debt or note and the final date due, the names of the borrowers, the original amount borrowed, the payment amount and dates of scheduled payments, the interest rate, and any security for the loan. If real property secures the loan, include either the Assessor's Parcel Number or the legal description of the property. For example: "Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original principal amount of $10,000.00, earning interest at the rate of 8%, due in a single payment of principal and accrued interest on May 23, 2007."
2. Enter the **Value** of the debt or note. The program will convert whole dollar entries to currency format for you.
3. Enter the amount of any **Accrued Interest** for the debt or note that had accrued as of the date of appointment of the guardian but had not yet been credited.
4. If you are adding/updating an asset on the **Community Property** form, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset on the **Community Property** form after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Securities Overview

Asset description categories in the **Securities** listing are shown below. Click **Entering Asset Information** 158 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Brokerage Accounts
Common and Preferred Stocks
Mutual Funds
Stock Options
Corporate, State and Municipal Bonds
United States Treasury Notes and Bonds
Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC) Security
United States Savings Bonds
Other Securities

If a **Securities** asset doesn't fit into any other category, enter the asset in the **Other Securities** category.

Entering Asset Information

The window used for **Securities** assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

Figure 13, US Savings Bond

Description - Enter a description of the security. Click the **Help** button to see a detailed description of required entries for each type of security.

Appraised Value (from referee) - Enter the referee-appraised value of the security.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the security qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Securities** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Other Intangible and Unscheduled Property

This window helps you enter assets which do not fit into any other listed category. To enter new assets or update existing asset descriptions in this category, follow the steps below:

1. Enter a **Description** of the asset in the designated field. Include a full description of intangible property not included in any of the previously described categories that was owned by the minor. For example: "Copyright and future royalty stream from 2001 book, 'The Life and Times of J.J. Schmidt', ISBN no. 1234567890, published by Narcissus Press."
2. Enter the **Appraised Value (from referee)** of the property. The program will convert whole dollar entries to currency format for you.
3. If you are adding/updating an asset on the **Community Property** form, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset on the **Community Property** form after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Other Windows

Selecting a Case

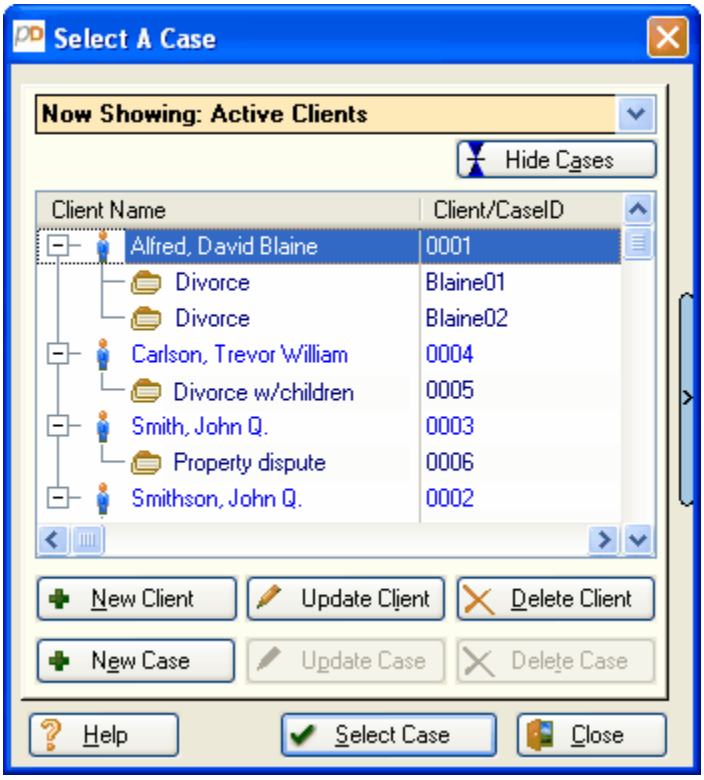


Figure 14, Selecting a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input. It lists existing ProDoc clients and all cases for the clients. You can use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click on a displayed case and then press the **Enter** key.
- Click on a displayed case and then click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients.** Other choices are **All Contacts, Closed Contacts, Private Clients** and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

Select a Date Window

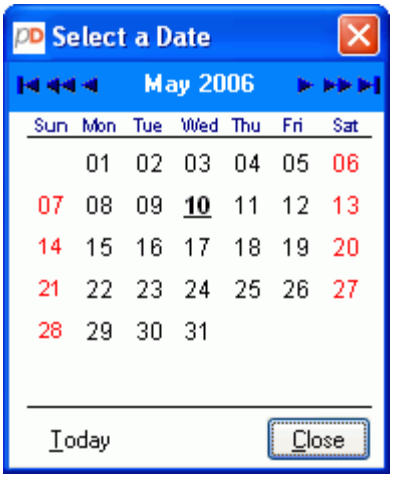


Figure 15, Select a Date Window

This window helps you quickly complete date fields. Tools and buttons on this calendar tool, depicted as Figure 15, include:

- and - Click to move back or forward one year.
- and - Click to move back or forward one month.
- and - Click to move back or forward one week.
- Use **Up** and **Down** arrow keys to move back and forward one week.
- Use **Left** and **Right** arrow keys to move back and forward one day.
- Click **Today** to move the underline/highlight to today's date.
- Click on the date to choose it or press the **Enter** key to choose the underlined date.
- Click **Cancel** to close the calendar without choosing a date.

Guardianship - UCCJEA Declaration

Getting Started

The California **Guardianship - UCCJEA (Uniform Child Custody Jurisdiction and Enforcement Act) Declaration** program is designed to assist you with entering the current address of each minor child, as well as the five year residential history of each child. As a part of the declaration, you can enter additional information regarding ancillary matters which affect the minor children. Finally, you can list all third-parties claiming visitation and/or custody rights to the children.

This feature allows you to:

- Enter information about the parties and the minor children that are affected by the proceeding.
- Enter the current address of each minor child, as well as the five year residential history of each child.
- Enter the names and addresses of nonparties who may have actual physical custody of the child(ren), or are claiming visitation and/or custody rights to the minor children.
- Enter other proceedings which concern the minor children affected by this suit in which any declarant participated or had knowledge.
- Complete and print the **UCCJEA Declaration.**

Starting the Program

To open the **UCCJEA Declaration** program:

1. Click **PowerPacks** → **Guardianships** → **UCCJEA Declaration**.
2. The **Select a Case** 172 window opens. Select a case by double-clicking a visible case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button. Click the **Help** button on the window for detailed help for finding and selecting cases.
3. The **UCCJEA Declaration** program opens at the **General** 163 Form.

Hot Keys

This program has built-in hot key navigation. Wherever a window, screen or field title shows an underlined character, i.e., "**Respondent**", you can navigate to that entry by holding the "**Alt**" key and pressing the underlined keyboard character. In the earlier example, pressing **Alt + O** on your keyboard puts your cursor in the **Respondent** field.

UCCJEA Toolbar

Figure 1, UCCJEA Toolbar

The toolbar along the bottom of the **UCCJEA Declaration** program consists of the **Help**, **Print**, **Save and Continue**, **Save and Close**, and **Cancel** buttons. The buttons and their actions are discussed below.

Help - Click this button to see help for the form you are viewing.

Print - Click this button to generate the **UCCJEA Declaration** form (GC-120) in ProDoc and print it. The **Print Preview** window appears, asking if you want to preview the document before printing it. Click the **Yes** button to preview the document before printing it. Click the **No** button to print the

document without previewing it.

Save and Continue - Click this button to save your work and continue working in the program.

Save and Close - Click this button to save your work and close the program.

Cancel - Click this button to exit the program. A caution window appears, telling you that canceling will cause you to lose all information you entered since the last save, and asking you if you want to continue. To return to the program to save your work, click **No**. If you do not want to save your work, click **Yes**.

General Form

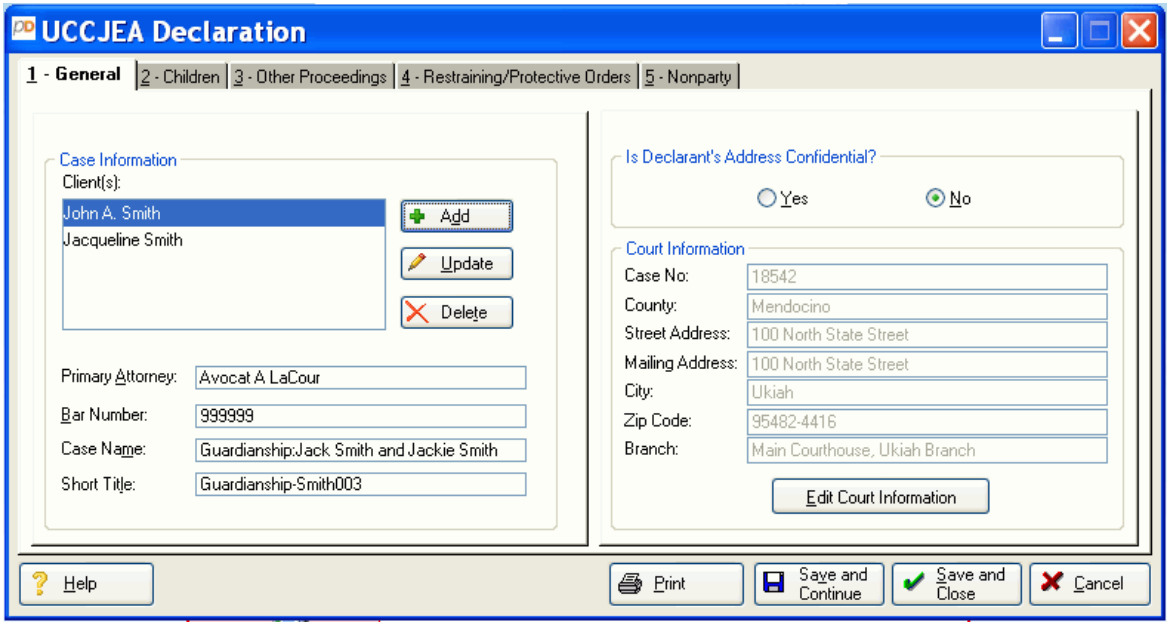


Figure 2, General Form

To complete the **General Form**, perform the following steps:

1. In the **Case Information** section:
   a. The client you selected when you opened the program appears in the **Client(s)** field. If you wish to add additional client name(s), click the **Add** button. The **Add Client** window appears. Add a client name and click **OK**. To add an additional client name, click the **Add** button again.
   b. If you wish to change a client name, highlight the client name to change and press the **Update** button. The **Edit Client** window appears. Enter your changes and click **OK**.
   c. You can also delete a client name with the **Delete** button (a confirmation popup window will appear).
   d. Enter the primary attorney's name in the **Primary Attorney** field and enter that attorney's **Bar Number** in the indicated field.
   e. Enter the **Case Name**. This can be anything you choose, such as the petitioner's name or declaration type. For example, "Guardianship for Jack Smith and Jackie Smith."
   f. Select the **Short Title** field. The information in the **Case Name** field is automatically duplicated here. You can edit this to anything you choose.

      NOTE: After information is automatically entered from the **Case Name** field to the **Short Title** field (as in 1.e. and 1.f., above), you can edit either the **Case Name** or the **Short Title** field without affecting the other field, so long as the **Short Title** field is not blank.

2. In the section labeled **Is Declarant's Address Confidential?**, click the appropriate answer.
3. In the **Court Information** section, click the **Edit Court Information** button. Enter the case number, county, branch, street and mailing address. The address fields are normally completed automatically depending upon county and branch entries.

When you have completed the **General Form**, click the **Save and Continue** or the **Save and Close** button to save your work to this point.

Children Form

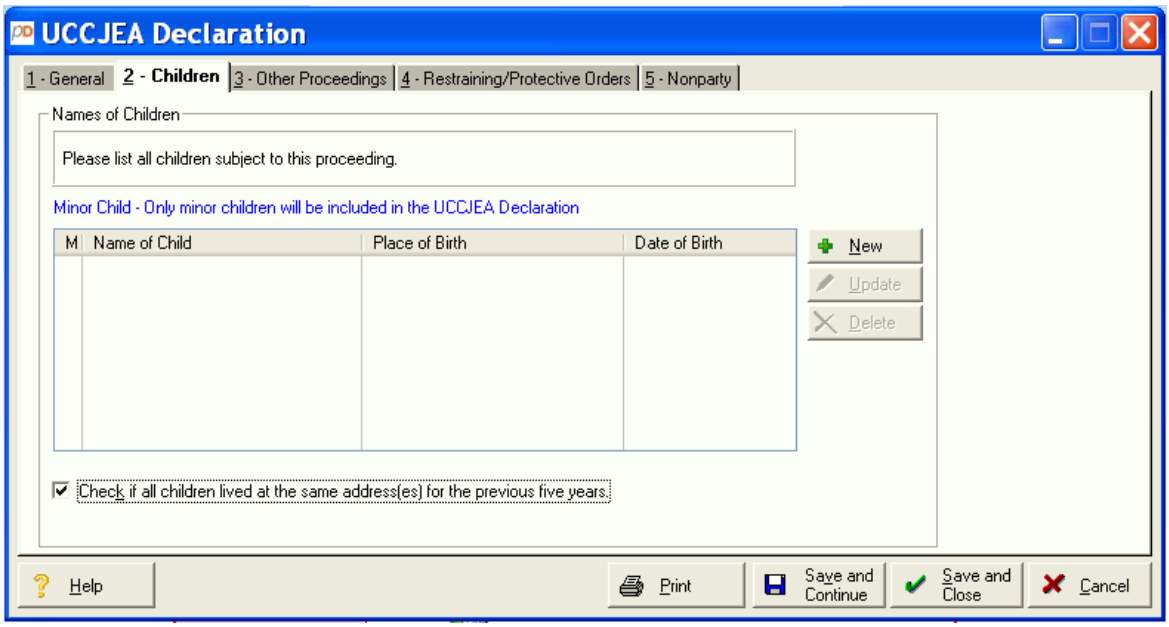


Figure 3, Children Form

The **Children Form** lists the children that are affected by the proceeding. You can enter the current address of each child, as well as the five year residential history of each child. We suggest you enter the oldest child's name and information first, as the initial child.

This topic contains specific help on **Children Form** entries and an overview of the process of completing related windows. For detailed help on the windows you use while completing the **Children Form**, click the **Help** button on each window. To see help for the windows in this manual, click the links in this section or continue scrolling to see help for the windows in the order that the windows appear.

Adding Children's Names
To add a child to the list of children affected by the proceeding, perform the following steps:

1. Click on the **Check if all children lived at the same address(es) for the previous five years** check box if the statement applies.
   a. When this box is checked, any child entered after the initial child automatically lists the same addresses as the initial child.
   b. If you *do not* check the box labeled, **Check if all children lived at the same address(es) for the previous five years**, you will need to enter the addresses for each child separately.
2. Click the **New** button. The **Adding Child's Address Information** window appears.

Changing Child's Address Information

To update a child's information, do any one of the following at the **Children Form** to open a window to

update the information:

- Double-click the child's name.
- Right-click the child's name and click **Update** on the menu that appears.
- Click the name and click the **Update** button.

To delete a child from the listing, click the child's name at the **Children Form** and click the **Delete** button, or right-click the child's name and click **Delete** on the menu that appears. On the confirmation window that appears, click **Yes** to delete the child or **No** to return to the **Children** form without deleting the child.

Adding/Changing Child's Information

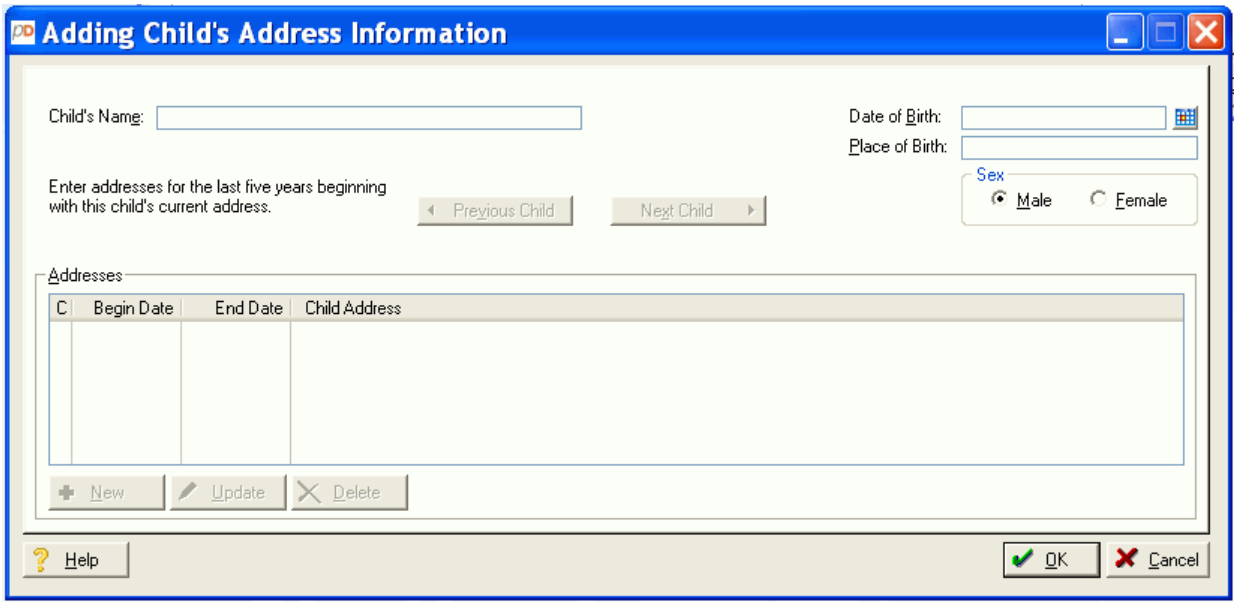


Figure 4, Adding Child's Address Information Window

This window is used to add the initial child and that child's residential history when you have selected the check box on the **Children Form** labeled, **Check if all children lived at the same address(es) for the previous five years**. If you *did not* check this box, will have to enter the addresses of each child separately (each time using this window).We suggest you enter the oldest child's name and information first as the initial child. Figure 4 depicts the window when it is used to add an initial child's information.

Addresses are listed with the present address listed first, followed by previous addresses and the inclusive dates lived at each address.

To complete entries on this window, perform the following steps:

1. Enter a **Child's Name**.
2. Enter the child's **Date of Birth** in mm/dd/yyyy format, or click the calendar icon and choose the date with the Select a Date 173 window.
3. Enter the child's **Place of Birth (City, State)**.
4. In the Sex section, click the appropriate button for **Male** or **Female**.
5. Click **OK** to return to the **Children Form** or, if you have additional names to add, click **Next**

Child. A warning box appears asking, "**Do you wish to add another child to the UCCJEA Declaration?**" Click **Yes** and another **Adding Child's Address Information** window appears. Click **No** and you are returned to the **Adding Child's Address Information** window in which you just added a child's information. Click **OK** when you have entered the last child's information to save and return to the **Children Form**.

6. Select the top entry (the name of the initial child), and click Update. The **Changing Child's Address Information** window appears. Click here 166 to go to help in completing this form
7. If you want to add more addresses for the child, click the **Add Another** button.

When you finish entering the addresses, click **OK.** Click **Cancel** to close the window without saving your entries.

Button Descriptions and Functions

Previous Child - Click this button to display the window's information for the previous child on the list. You can now add, update or delete addresses for this child. If you are currently working with the first child on the list, this button will be disabled.

Next Child - Click this button to display the window's information for the next child on the list. You can now add, update or delete addresses for this child. If you are currently working with the last child on the list, a dialog window will appear to ask if you wish to add another child. Click **Yes** to do so or **No** to close the window.

New - Click this button to add an address for the listed child. This choice also appears if you right-click anywhere inside a list box.

Update - Click this button to update an address for the listed child. You can also double-click an address entry to update it. This choice also appears if you right-click a child's address entry.

Delete - Click this button to delete the highlighted address for the listed child. This choice also appears if you right-click a child's address entry.

OK - Click this button to enter the information on the **Children Form** and close the window.

Cancel - Click to close the window and return to the **Children Form**. Your entries will not be saved.

Child's Address

This window is used to add address information for a minor child. It also allows you to update a previous entry. To complete the entries on this window, perform the following steps:

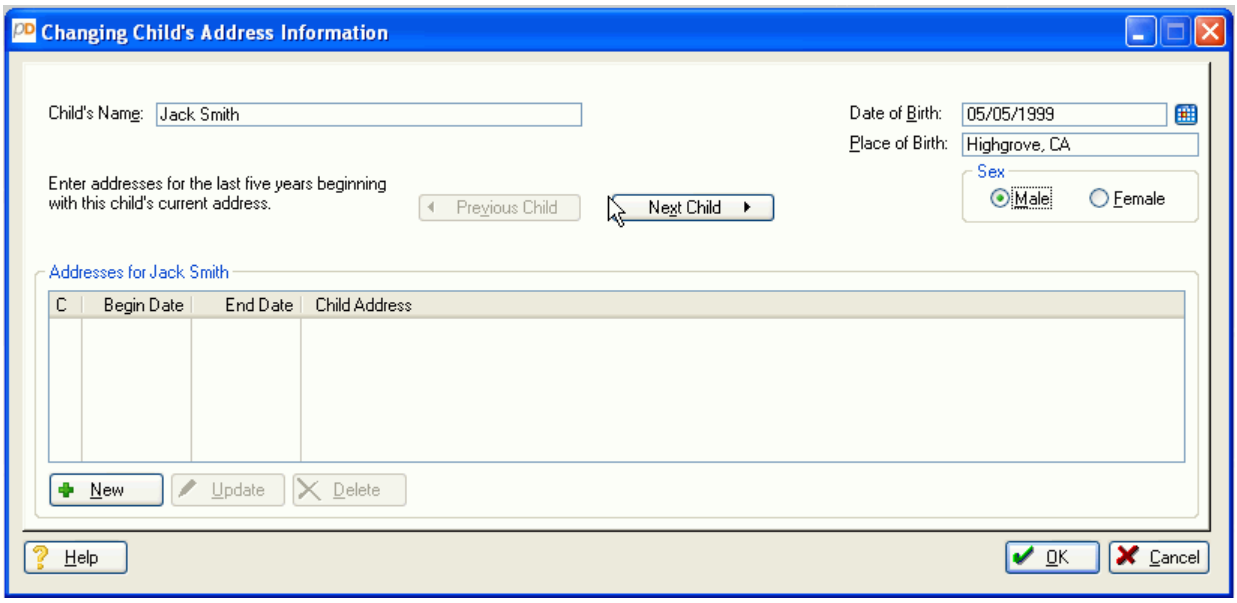


Figure 5, Changing Child's Address Information (Initial Entry)

1. At the **Changing Child's Address Information** window, click the **New** button at the bottom of the **Address for [child's name]** section. The **Adding Child's Address** window appears.

2. Enter the **Begin Date** and **End Date** in the corresponding fields, or click the calendar button and choose the date with the **Select a Date** 173 window.

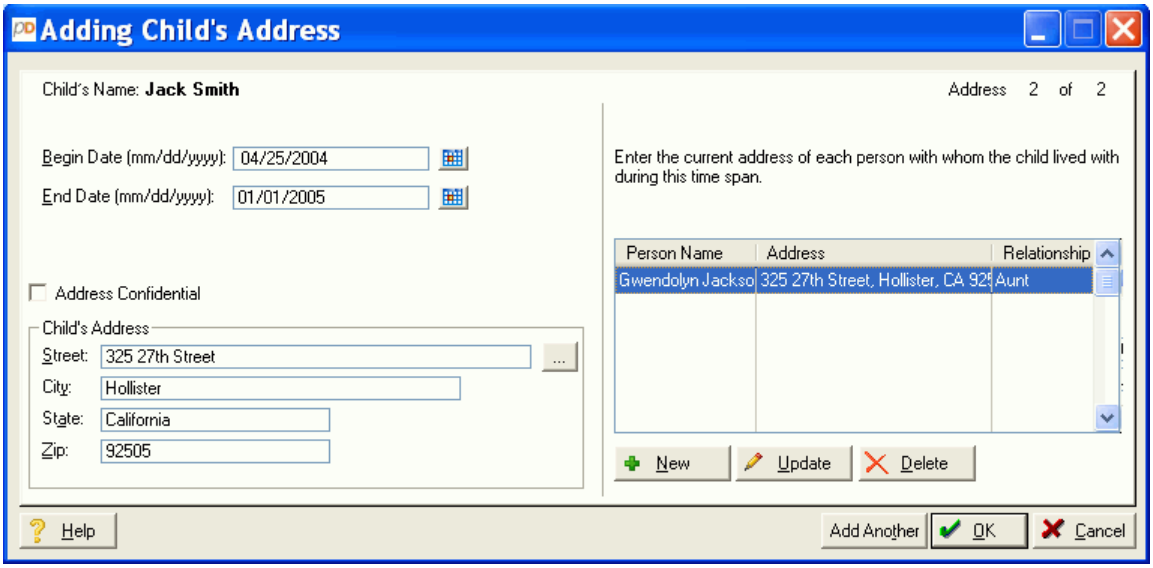


Figure 6, Adding Child's Address window

3. If you want to keep any addresses confidential, click the box labeled **Address Confidential.** You will need to complete the **City** and **State** fields at a minimum. If desired, you can enter all address fields. If the box is checked, these fields will be displayed on your declaration as follows, regardless of whether or not you enter the street address and zip code:
   a. Most current address: Your printed declaration will only show "Address Confidential" for that address.
   b. Other address: Your printed declaration will show "Address Confidential" as the street address, and it will also display the entered city and state.

4. Enter the child's addresses for the past five years in the **Street, City, State** and **Zip** fields. You can also click the browse button [...] next to the **Street** field to choose previously entered addresses.
5. On the right side of the window, click the **New** button to add the current address of each person the child lived with during the time span. The **Current Address** window appears. Click **here** 168 for help completing the **Current Address** window.

Person Child Lived With

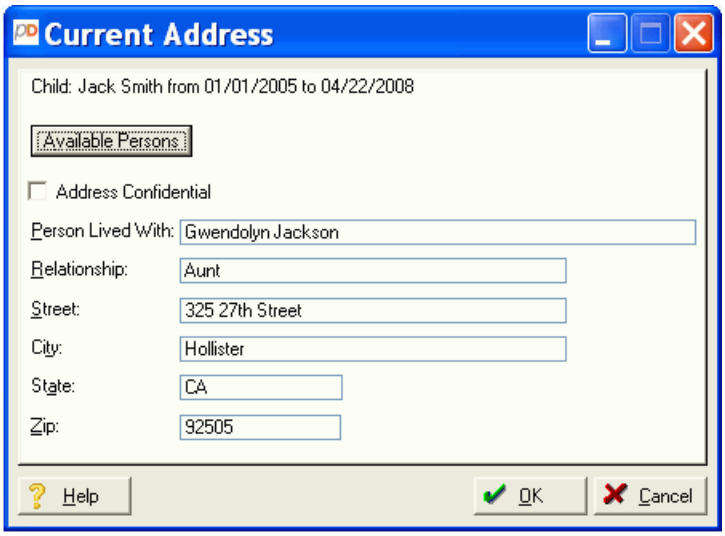


Figure 7, Current Address Window

This window is used to add a person who lived with the child during a particular time span. It also allows you to update a previous entry. To complete the entries on this window, perform the following steps:

1. You can click the **Available Persons** button. The **Select a Person** window appears and you can quickly copy information for persons you've already entered into the program, or type the entries in the fields.
2. To keep this person's current address confidential, check the **Address Confidential** box, then complete the mandatory **Person Lived With** and **Relationship** fields. If desired, enter the address fields. Whether or not you enter the address, it will be displayed on your printed declaration as Address Confidential.
3. If there is no need to keep the address confidential, leave the **Address Confidential** box unchecked and complete all entry fields. The person's current address information should be entered. If the Address Confidential box is not checked, the full address will be displayed on your printed declaration.
4. Click the **OK** button, or click the **Cancel** button to close the window without saving your entries.

NOTE: If the person with whom the child lived is your client and you change the person's name or address here, you should make the same changes to the client's information in the Client/Case Manager. There is a possibility that your client will be listed twice in the available persons list if you enter information that is different from the information entered in the Client/Case Manager.

Other Proceedings Form

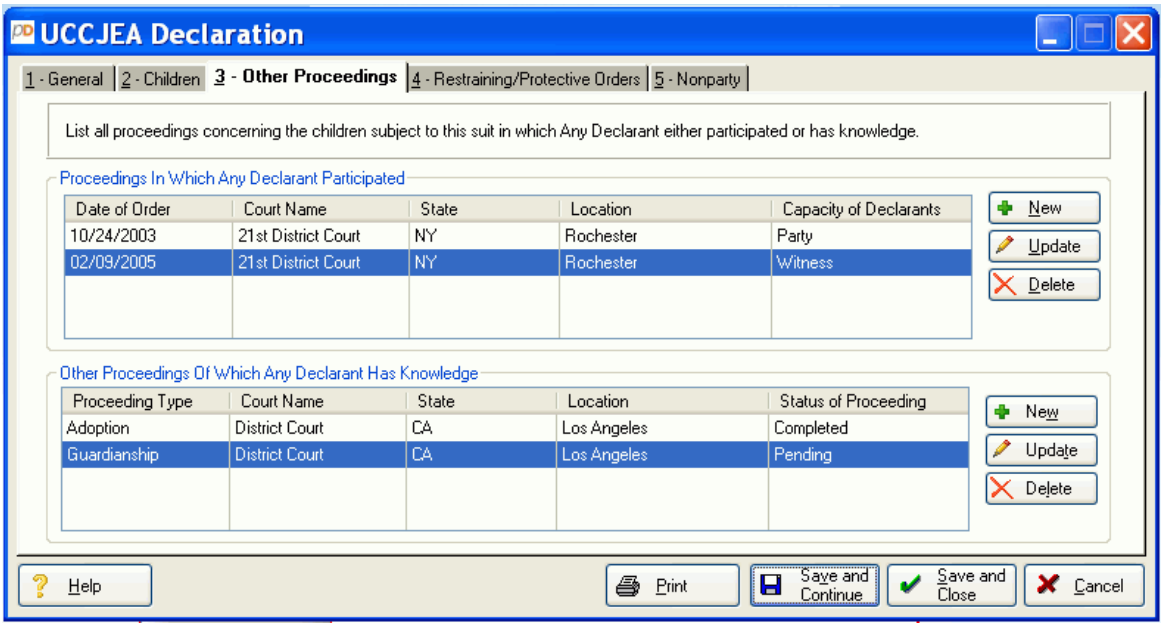


Figure 8, Other Proceedings Form

The **Other Proceedings Form** lists other relevant proceedings concerning the minor child(ren) affected by this suit in which any declarant was involved, either by participation or by knowledge.

Select the upper **New** or **Update** buttons to complete the **Proceeding In Which Any Declarant Participated** section fields, and select the lower **New** or **Update** buttons to complete the **Proceeding Of Which Any Declarant Has Knowledge** section fields. If there is a single client (declarant) listed on the **General Form**, the titles of these section fields are: **Proceedings In Which Declarant Participated** and **Other Proceedings In Which Declarant Has Knowledge**.

Restraining/Protective Orders Form

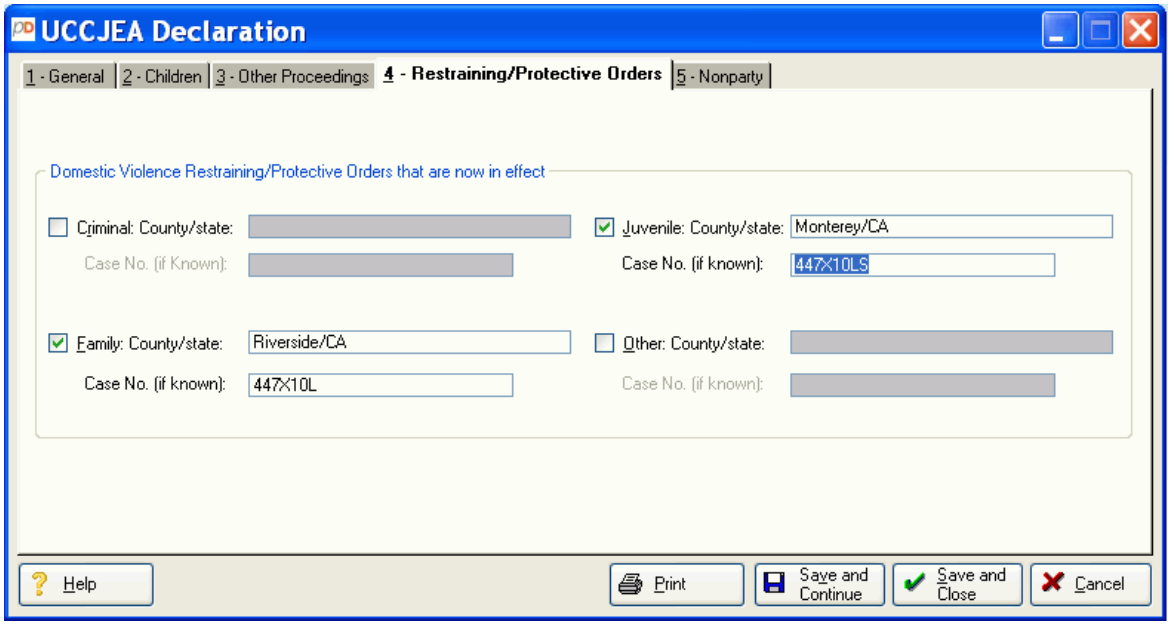


Figure 9, Restraining/Protective Orders Form

The **Restraining/Protective Orders** form allows you to enter information on any current domestic violence orders that affect or are related to the case at hand. To complete the form, click the appropriate check box to indicate the type of court that issued the order (**Criminal**, **Juvenile**, **Family**, or **Other**). The entry fields for the particular type of court will activate. Enter the **County/state** where the order was issued. If known, enter the **Case No.** for the case associated with the order.

Nonparty Form

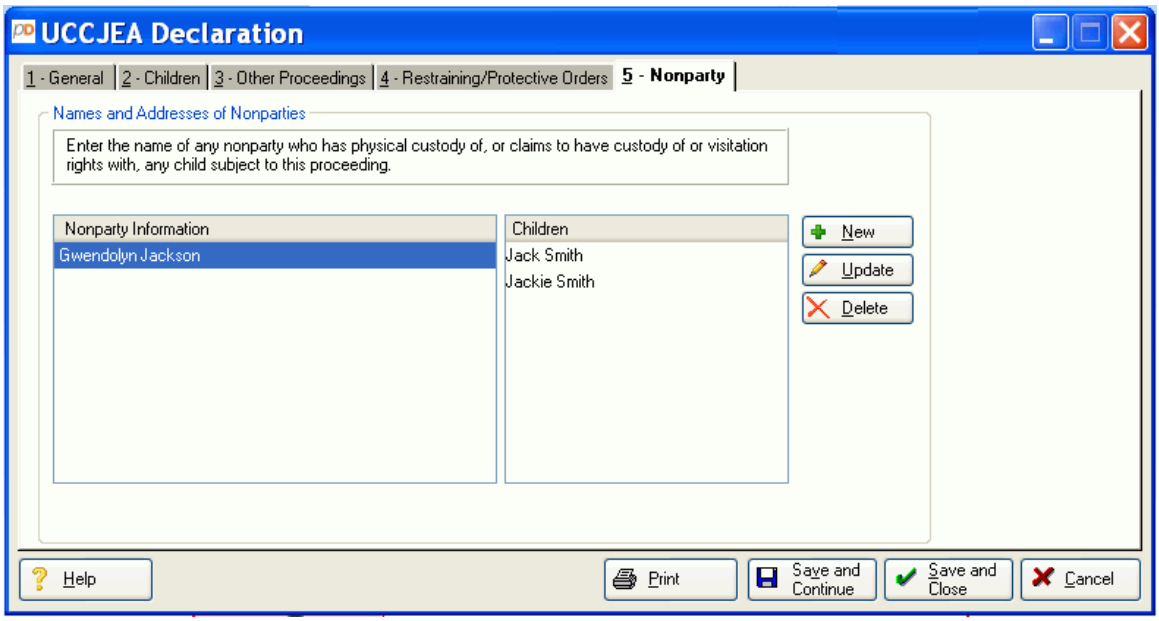


Figure 10, Nonparty Form

The **Nonparty Form** helps you enter names and addresses of nonparties who may have physical custody of the child(ren) or are claiming visitation or custody rights subject to the action.

To enter the nonparty claiming actual physical custody, visitation or custody rights to the child(ren) subject to the action, perform the following steps:

1. Click **New**. The **Adding Nonparty Information** 171 window appears.
2. Enter the nonparty's name or select it by clicking the **Available Persons** button and making your selection from the **Select a Person** window.
3. In the **Type of Claim** section, click the appropriate entry (or entries) to describe the nonparty's type of claim: **Has Physical Custody**, **Claims Custody Rights**, or **Claims Visitation Rights**.
4. If you want to keep the address confidential, click the box labeled **Address Confidential**. If this box is checked, only "Address Confidential" will be printed on the declaration instead of any address information you enter.
5. Enter the nonparty's address in the **Address** section. If you selected the party with the **Available Persons** button, the address you entered previously is automatically applied.
6. In the **Check Affected Children** section, select each child affected by clicking the appropriate name. You can also click a selected name to clear the check box.
7. Click **OK** to save the information and return to the **Nonparty Form**.
8. Repeat the process to add other nonparties. When you are finished, click the **Save and Continue** button or the **Save and Close** button to save your work to this point.

To update/edit a nonparty entry, double-click the name from the **Select a Person** window or click the name at the **Nonparty Form** window and click the **Update** button. Use the procedures above to edit

the information.

To delete a nonparty from the listing, click the name and click the **Delete** button. On the confirmation window that appears, click **Yes** to delete the nonparty or **No** to return to the **Nonparty Form** without deleting the nonparty.

Adding or Changing Nonparty Information

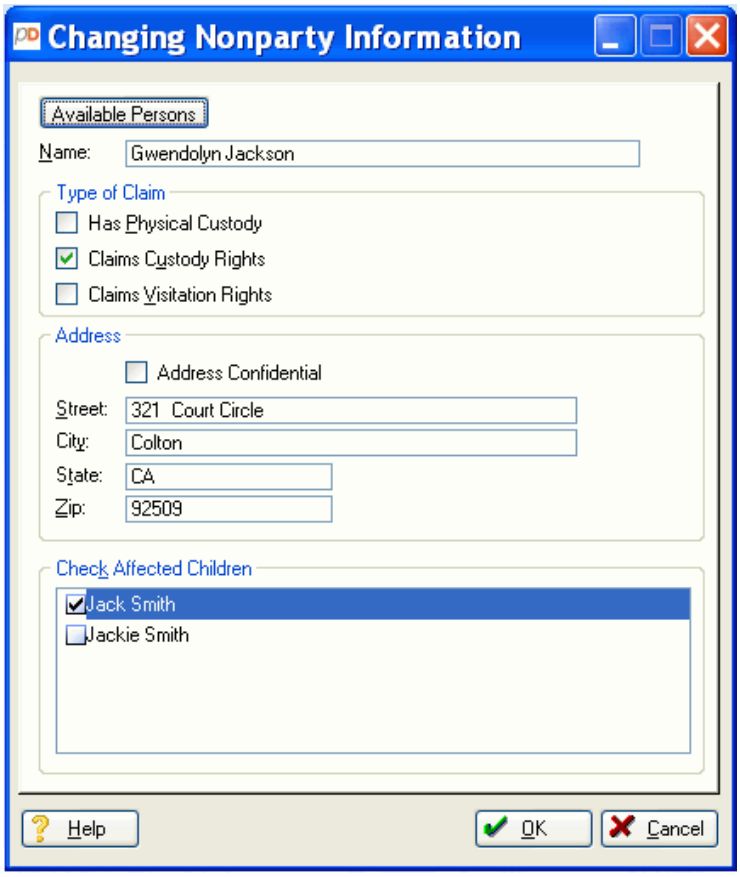


Figure 11, Changing Nonparty Information Window

This window allows you to add or update a nonparty's information. If you selected **New**, the title of this window is **Adding Nonparty Information**. If you selected **Update**, the title of this window is **Changing Nonparty Information**. To complete this window, perform the following steps:

1. Enter the nonparty's name or select it by clicking the **Available Per**sons button and making your selection from the **Select a Person** window.
2. In the **Type of Claim** section, select whether the nonparty **Has Physical Custody**, **Claims Custody Rights**, or **Claims Visitation Rights** by clicking the appropriate check box.
3. If you want to keep the address confidential, click the box labeled **Address Confidential**. If this box is checked, only "Address Confidential" will be printed on the declaration instead of any address information you enter.
4. Enter the nonparty's address in the **Address** section. If you selected the party with the **Available Persons** button, the address you entered previously is automatically entered.
5. In the **Check Affected Children** section, click the name of the children who are affected. You can also click a selected name to clear the selection.
6. Click **OK** to return to the **Nonparty Form**. Click **Cancel** to close the window without saving your entries.

Other Windows

Selecting a Case

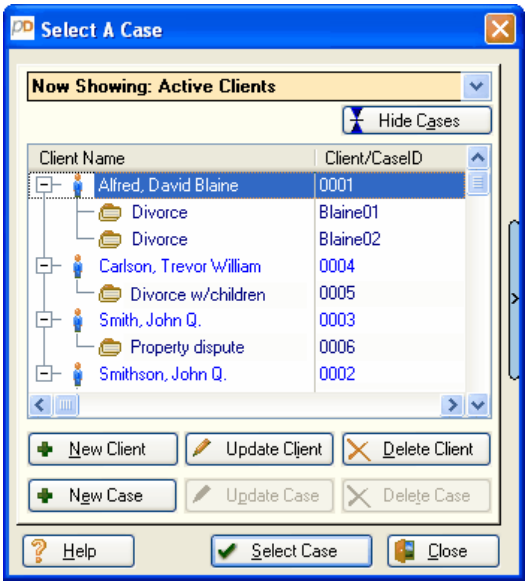


Figure 12, Select a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input. It lists existing ProDoc clients and all cases for the clients. You can use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click on a displayed case and then press the **Enter** key.
- Click on a displayed case and then click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients**. Other choices are **All Contacts and Cases, Closed Clients, Private Clients** and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

Select a Date Window

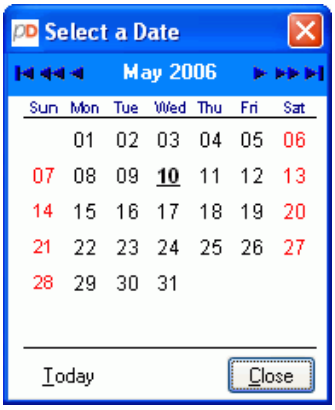


Figure 13, Select a Date Window

This window helps you quickly complete date fields. Tools and buttons on this calendar tool, depicted as Figure 13, include:

- and - Click to move back or forward one year.
- and - Click to move back or forward one month.
- and - Click to move back or forward one week.
- Use **Up** and **Down** arrow keys to move back and forward one week.
- Use **Left** and **Right** arrow keys to move back and forward one day.
- Click **Today** to move the underline/highlight to today's date.
- Click on the date to choose it or press the **Enter** key to choose the underlined date.
- Click **Close** to close the calendar without choosing a date.

Guardianship Accounting

Getting Started

It's easy to produce an estate accounting for your guardianship matters with the **Guardianship Accounting** program. This program completely eliminates manual calculations, simplifies your work and dramatically reduces the time necessary to handle guardianship matters. You need to only list the necessary information once. ProDoc automatically calculates the value of the estate and prints the required forms and attachments.

Starting the Program

1. Click **PowerPacks →Guardianships → Accounting**.
2. The **Select a Case** 206 window opens. Select a case by double-clicking a visible case title. You can also click the title once, then press the Enter key or click the Select Case button. Click the Help button on the window or click here 206 for detailed help for finding and selecting cases.
3. The **Guardianship Accounting** program opens to the **General** tab.

Navigating the Guardianship Accounting Program

There are nine tabs across the top of the main program window: **General** 176, **Begin Comm Property** 177, **Begin Sep Property** 181, **Charges** 183, **Credits** 187, **End Comm Property** 191, **End Sep Property** 193, **Changes in Asset** 195, and **Liabilities** 249. Each tab represents a different form. To move from one form to another, position the cursor over the tab you want to use and click on it.

The tabs labeled **Begin Comm Property** and **End Comm Property** are abbreviations for **Beginning Community Property** and **Ending Community Property**. In like manner, the tabs labeled **Begin Sep Property** and **End Sep Property** are abbreviations for **Beginning Separate Property** and **Ending Separate Property**.

You can also use hot keys. Wherever a window, screen or field title shows an underlined character, i.e., "**Case Number**", you can navigate to that entry by holding the "**Alt**" key and pressing the underlined keyboard character. In the earlier example, pressing **Alt + a** on your keyboard puts your cursor in the **Case Number** field.

Help With Using the Guardianship Accounting Program

- Click the **Help** buttons on each window (or press the **F1** key).
- View or print the **ProDoc Software Manual.**
- View Computer Based Training (CBT) Modules at the **ProDoc Website**.
- Periodic ProDoc user seminars; schedule these at the **ProDoc Website**.
- Call our Customer Support specialists at 1-800-759-5418.
- Send email to **tech@prodoc.com**.

Main Toolbar

Figure 1, Main Toolbar

The toolbar along the bottom of each of the nine major forms consists of the **Help**, **Copy Property To**, **Print**, **Send to Excel**, **Save and Continue**, **Save and Close**, and **Cancel** buttons. This toolbar is always available while you are using the program. The buttons and their actions are discussed below.

Help - Click this button to display the help topic for the form or the current window.

Copy Property To - Click this button to copy asset data, credits, and charges from the current minor to another minor with whom you wish to share the data. A box opens titled **Minor Selection**, displaying the names of all minors, and the message, **Select minor(s) For Whom You Want To Copy Accounting Information**. Accept the selection of all minors or select only the names of minor(s) for whom you want to copy the accounting information. A box titled **Copy Complete** appears with the message, **All accounting information has been successfully copied from [minor name] to the minor(s) you selected.**

Print - Click this button to print and/or preview form GC-400/GC-405 accounting forms. Here is the sequence of events after pressing the **Print** button:

1. A box opens titled **Minor Selection** appears with the message, **Select Minors For Whom You Want To Print The Accounting**. Accept the selection of all or select only the names of minor(s) for whom you want to print the accounting.
2. A box opens titled **Select Type of Accounting** with the caption, **Type of Accounting for [Minor Name]**. Select **Standard Account** or **Simplified Account** and click **OK**.

   If you selected **Simplified Accounting** a message box *may* appear titled **Confirm** with the message, **You have chosen to print a Simplified Accounting, but we have found that you may have met the Standard Accounting filing requirements. Are you sure that you want to print the Simplified Account?** Click **Yes** and the Simplified Accounting form prints. Select **No** and you are returned to the **Select Type of Accounting** decision box described in Step 2.

3. A box opens titled **Preview Standard Account** and the message, **Do you want to preview this form?** Click **Yes** to view the form; click **No** and the forms are sent to your default printer.
4. After the accounting forms are sent to the printer, a box appears titled **Report Progress,** with the message, **This is a complex form which will take some time to Complete. The actual time will depend on the speed of your computer and your free memory available**.

Send to Excel - Click this button to send all categories and amounts entered in the program to an Excel spreadsheet.

1. A box opens titled **Minor Selection**. Accept the selection of **All** or select only the names of minor(s) for whom you wish to export inventory data to Excel spreadsheets and click **OK**.
2. **A Save CSV File** window appears. Accept the name of the minor you selected (followed by a filename extension of **.csv**) as the filename to be saved or select any filename you wish, but keep the **.csv** filename extension. Click **Save** to save your CSV (comma separated values) file.
3. A Microsoft Excel window opens with the CSV spreadsheet displayed.

Save and Continue - Click this button to save the data that has been entered and continue working with the program.

Save and Close - Click this button to save the data that has been entered and exit the program.

Cancel - Click this button to exit the program without saving the information that you entered during the current session.

General Form

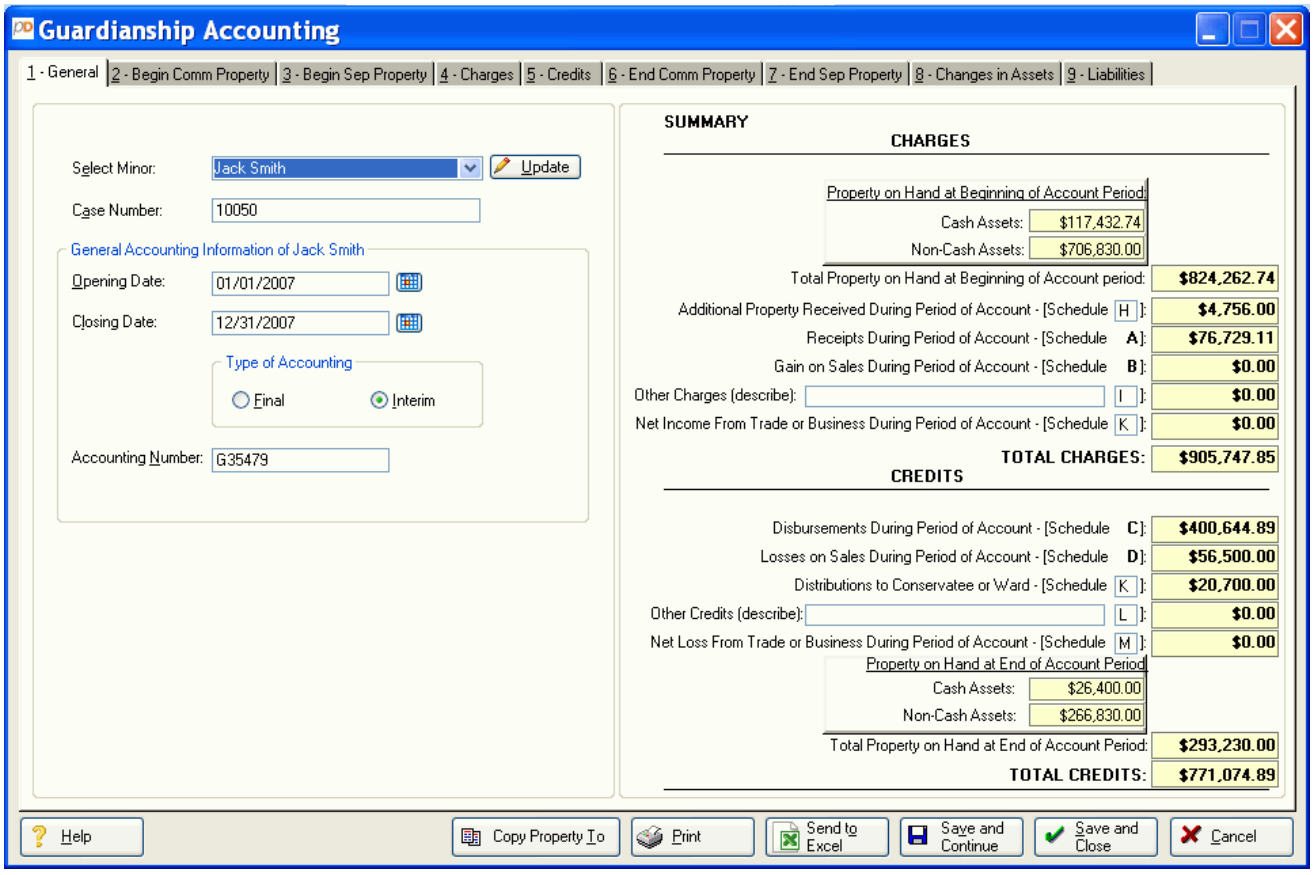

Guardianship Accounting
1 - General
2 - Begin Comm Property
3 - Begin Sep Property
4 - Charges
5 - Credits
6 - End Comm Property
7 - End Sep Property
8 - Changes in Assets
9 - Liabilities
Select Minor:
Jack Smith
Update
Case Number:
10050
General Accounting Information of Jack Smith
Opening Date:
01/01/2007
Closing Date:
12/31/2007
Type of Accounting
Final
Interim
Accounting Number:
G35479
SUMMARY
CHARGES
Property on Hand at Beginning of Account Period
Cash Assets: $117,432.74
Non-Cash Assets: $706,830.00
Total Property on Hand at Beginning of Account period: $824,262.74
Additional Property Received During Period of Account - [Schedule H]: $4,756.00
Receipts During Period of Account - [Schedule A]: $76,729.11
Gain on Sales During Period of Account - [Schedule B]: $0.00
Other Charges (describe): [I]: $0.00
Net Income From Trade or Business During Period of Account - [Schedule K]: $0.00
TOTAL CHARGES: $905,747.85
CREDITS
Disbursements During Period of Account - [Schedule C]: $400,644.89
Losses on Sales During Period of Account - [Schedule D]: $56,500.00
Distributions to Conservatee or Ward - [Schedule K]: $20,700.00
Other Credits (describe): [L]: $0.00
Net Loss From Trade or Business During Period of Account - [Schedule M]: $0.00
Property on Hand at End of Account Period
Cash Assets: $26,400.00
Non-Cash Assets: $266,830.00
Total Property on Hand at End of Account Period: $293,230.00
TOTAL CREDITS: $771,074.89
Help
Copy Property To
Print
Send to Excel
Save and Continue
Save and Close
Cancel

Figure 2, General Form

This form collects name(s) of minor child(ren), case number, accounting period dates, type of accounting, and accounting number information. A separate **Summary Section** presents totals of assets on hand at the beginning of the inventory, totals of property received or disbursed during the inventory period, and lastly, the totals of assets on hand at the end of the accounting period. This section presents a summation of the information that you have entered on all of the forms. This section is completed automatically as you enter information into all of the remaining program forms. You cannot edit entries on this form.

To complete the **General Form**, perform the following steps:

1. **Select Minor** - Press the **Update** button. The **Minor Names** popup window opens and you are prompted to **Enter the names of all minors**. **You may create a separate accounting for each minor.** Use the **New**, **Update,** or **Delete** buttons to add, edit, or delete minor names. The **Add Minor**, **Update Minor Name and Alias**, or **Confirm Delete** window appears, where you can add, update or delete the names of minors and any aliases by which they are known.
2. **Case Number:** Enter the case number for this minor child.
3. In the **General Accounting Information of [Minor Name]** section, enter the **Opening Date** and **Closing Date** of the accounting period. Click the calendar icon to easily Select a Date 207 from a pop-up calendar.
4. Enter the **Type of Accounting** you are performing (**Interim** or **Final**) by checking the appropriate button.
5. Enter the **Accounting Number**.

Beginning Community Property Form

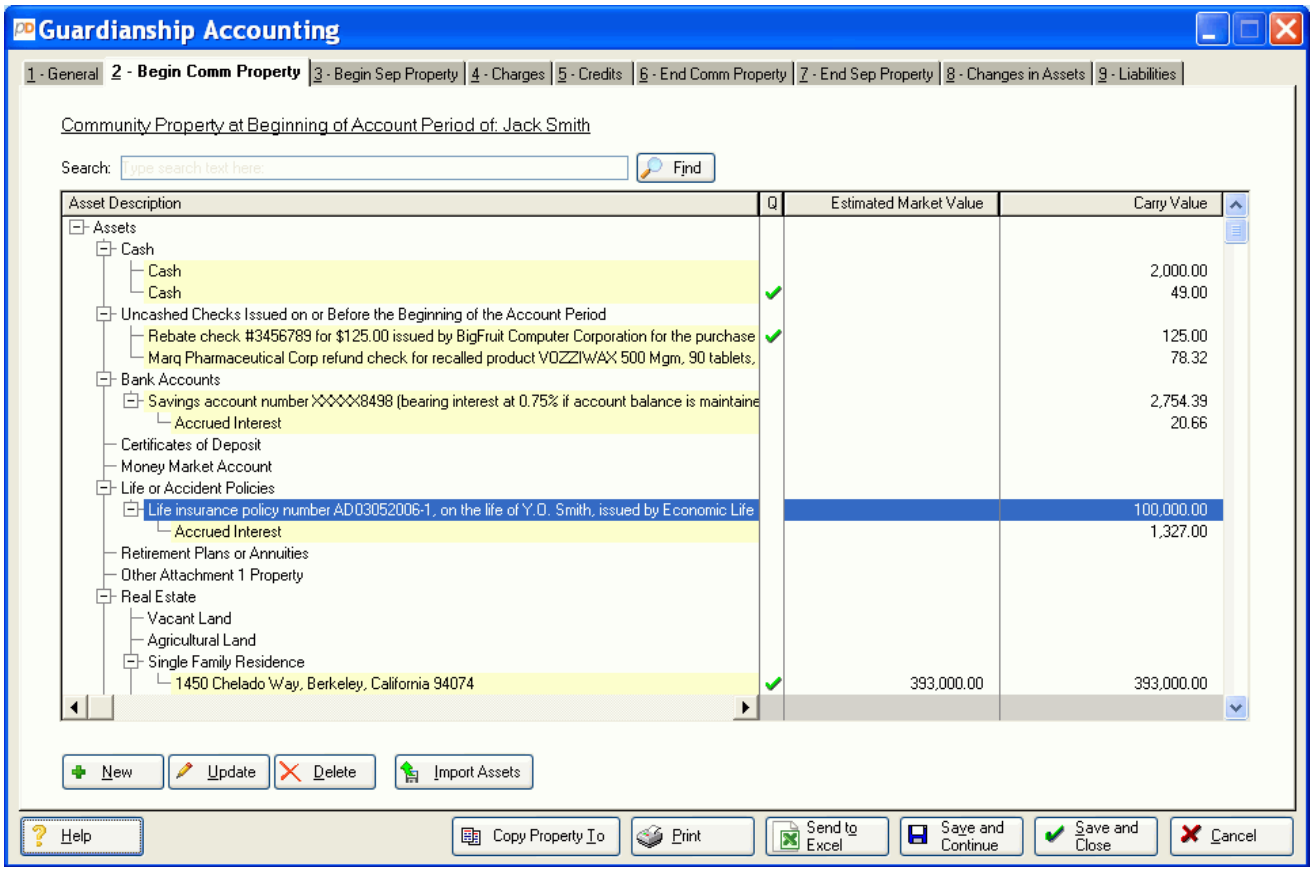

Guardianship Accounting
1 - General
2 - Begin Comm Property
3 - Begin Sep Property
4 - Charges
5 - Credits
6 - End Comm Property
7 - End Sep Property
8 - Changes in Assets
9 - Liabilities
Community Property at Beginning of Account Period of: Jack Smith
Search:
Find
Asset Description
Q
Estimated Market Value
Carry Value
Assets
Cash
Cash 2,000.00
Cash 49.00
Uncashed Checks Issued on or Before the Beginning of the Account Period
Rebate check #3456789 for $125.00 issued by BigFruit Computer Corporation for the purchase 125.00
Marq Pharmaceutical Corp refund check for recalled product VOZZIWAX 500 Mgm, 90 tablets, 78.32
Bank Accounts
Savings account number XXXXX8498 (bearing interest at 0.75% if account balance is maintaine 2,754.39
Accrued Interest 20.66
Certificates of Deposit
Money Market Account
Life or Accident Policies
Life insurance policy number AD03052006-1, on the life of Y.O. Smith, issued by Economic Life 100,000.00
Accrued Interest 1,327.00
Retirement Plans or Annuities
Other Attachment 1 Property
Real Estate
Vacant Land
Agricultural Land
Single Family Residence
1450 Chelado Way, Berkeley, California 94074 393,000.00 393,000.00
New
Update
Delete
Import Assets
Help
Copy Property To
Print
Send to Excel
Save and Continue
Save and Close
Cancel

Figure 3, Beginning Community Property Form

The **Beginning Community Property Form** collects community property asset information as of the beginning date of the accounting period.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets Are Displayed 177
Locating Asset Descriptions 177
Entering Assets 178
Importing Assets 179
Using Toolbar Buttons 181

How Assets Are Displayed

The information for each asset or property is displayed in four columns: **Asset Description**, **Q** (Quasi-Community Property, identified by a green check mark), **Estimated Market Value**, and **Carry Value.**

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.

- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** column.

Entering Assets

This procedure applies to the following forms:

- **Beginning Community Property Form**
- **Beginning Separate Property Form**.
- **Ending Community Property Form**
- **Ending Separate Property Form**

This is a general overview of steps to enter assets. Some types of assets have different fields than those given in this procedure. For specific help on various types of asset entries, click the **Help** button on each asset entry screen.

1. Double-click an asset description, right click a description and select **New Asset**, or click a description once and click the **New** button on the toolbar.
2. A window appears, titled with the description you chose. It will display the entry fields appropriate for the asset. When the cursor is placed in a field, a message appears with explanatory information regarding the information that should be entered.

   Expect to see different fields for the various types of assets. For example, real estate topics will have **Property Address**, **Property Description**, and **Carry Value** fields; whereas cash type assets will have fields for account **Balance** and **Accrued Interest**.
3. Complete the displayed fields for the asset. These will vary according to the type of asset you are entering.
4. In the **Description** field, enter a complete description of the asset.
5. In the **Comment** field, enter any relevant information which might aid in identifying the asset.
6. In the **Name of Inventory** field, list the type of inventory. For example: Initial, Partial, Final, Amended, Supplemental, Reappraisal for Sale, or Property Tax Certificate.
7. In the **Date of Inventory** field, list the date the inventory was signed in mm/dd/yyyy format or click the calendar icon to use **Select a Date** 207 calendar tool.
8. Enter the **Estimated Market Value** of the asset. The program will convert whole dollar entries to currency format for you.
9. Enter the **Carry Value** of the asset. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the guardian is its purchase price.)
10. In the **Amount** section (if shown), enter the amount of the asset. The program will convert whole dollar entries to currency format for you.
11. (This Step applies to the **Beginning Community Property Form** and the **Ending Community Property Form** only.)
    Check the box if the asset is Quasi-Community Property. When you are finished, either click the

Add Another button to enter another asset in the same category or click the **OK** button to return to the form in which you were entering assets. The descriptions and amounts will be listed here.

12. (This Step applies to the **Ending Community Property Form** and the **Ending Separate Property Form** only)
    Check the box that represents the **Property Status** of the asset: **Still on Hand**, **Disposed of**, or **Acquired**.
13. You may edit an entry by double-clicking it, by right-clicking a description and selecting **Update Asset**, or by clicking it and clicking the **Update** button on the toolbar.
14. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking an asset entry and clicking **Delete Asset**.
15. You may copy an asset entry to other minors by right clicking an entry and selecting **Copy Asset**. A **Minor Selection** window appears and you can **Select Minor(s) For Whom You Want to Copy Accounting Information**. After selecting all or selected names, click **OK** and a **Copy Complete** box appears with the message, **The selected item has been successfully copied from [Minor name] to the minor(s) you selected**. Click **OK** and you are returned to the form in which you were entering assets. Also, you may copy entire lists of assets to another minor by selecting **Copy Property To** on the toolbar.

Importing Assets

The **Import Assets** button on this form's toolbar allows you to select and import items from the last Guardianship Inventory and Appraisal for this minor child. This procedure applies to the **Beginning Community Property Form** and the **Beginning Separate Property Form**.

This is a general overview of the steps to import assets. For specific help on importing various types of asset entries, click the **Help** button on each import asset screen.

1. You may import an asset from this minor's last inventory report by clicking the Import Assets button. An Import Inventory message appears: This import will overwrite any assets with same description from the same inventory. Do you want to continue? Select OK and the Import Assets From Inventory window appears.

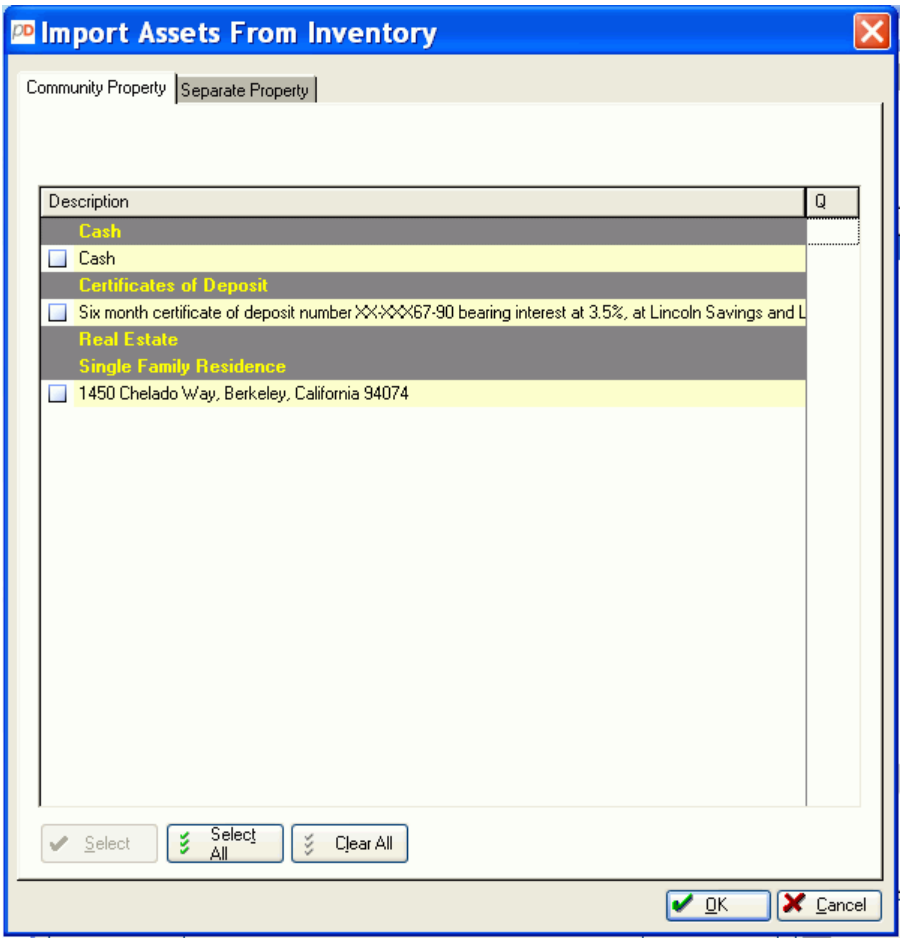


Figure 4, Importing Assets From Inventory Window

2. In the Import Assets From Inventory window:
   a. Select assets from the inventory's Community Property pages or Separate Property pages.
   b. Click check boxes to select assets to import.
   c. Click OK. The Inventory Information window appears.

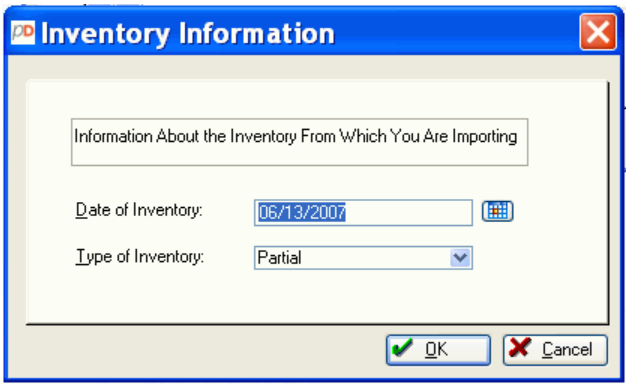


Figure 5, Inventory Information Window

3. In the Inventory Information window this message is displayed: Information About the Inventory From Which You Are Importing: Date of Inventory: [mm/dd/yyyy], Type of Inventory: [Initial, Partial, Final, Amended, Supplemental, Reappraisal for Sale, Property Tax Certificate].
   a. Click OK.

b. You are returned to the Beginning Community Property Form or the Beginning Separate Property Form.

Using Toolbar Buttons to Work with Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to an asset entry.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Import Assets - Select and import assets from this child's last inventory report.

Beginning Separate Property Form

This form collects separate property assets as of the beginning date of the accounting period.

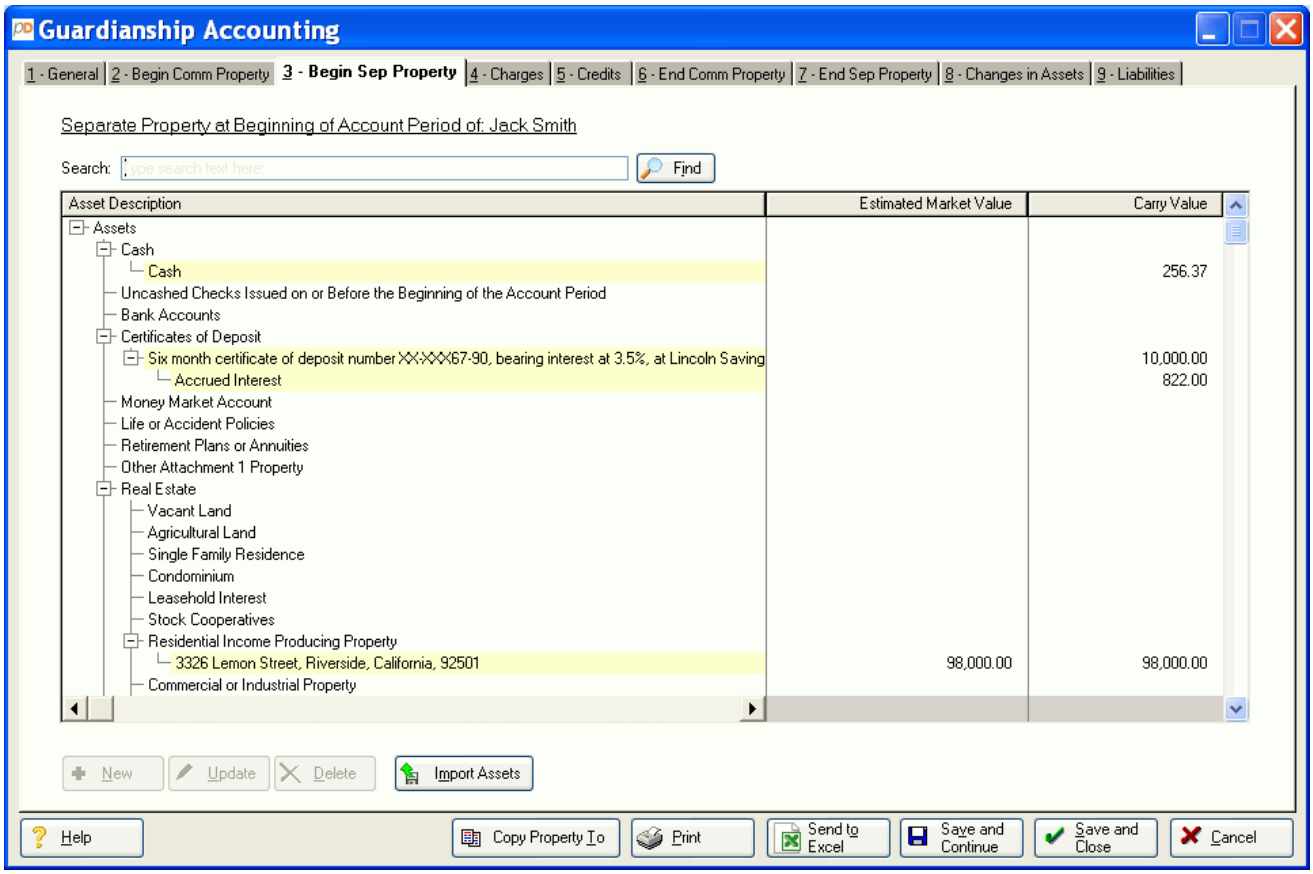


Figure 6, Beginning Separate Property Form

The **Beginning Separate Property Form** collects separate property asset information as of the beginning date of the accounting period.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 182

Locating Asset Descriptions 182

Entering Assets 182
Importing Assets 182
Using Toolbar Buttons 182

How Assets are Displayed

The information for each asset or property is displayed in three columns: **Asset Description**, **Estimated Market Value**, and **Carry Value**.

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

See the **Entering Assets** procedure in the **Beginning Community Property Form** for a general overview of the steps to enter assets.

Importing Assets

See the **Importing Assets** procedure in the **Beginning Community Property Form** for a general overview of the steps to import assets.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value, and any other necessary information to an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Import Assets - Select and import assets from this child's last inventory report.

Charges Form

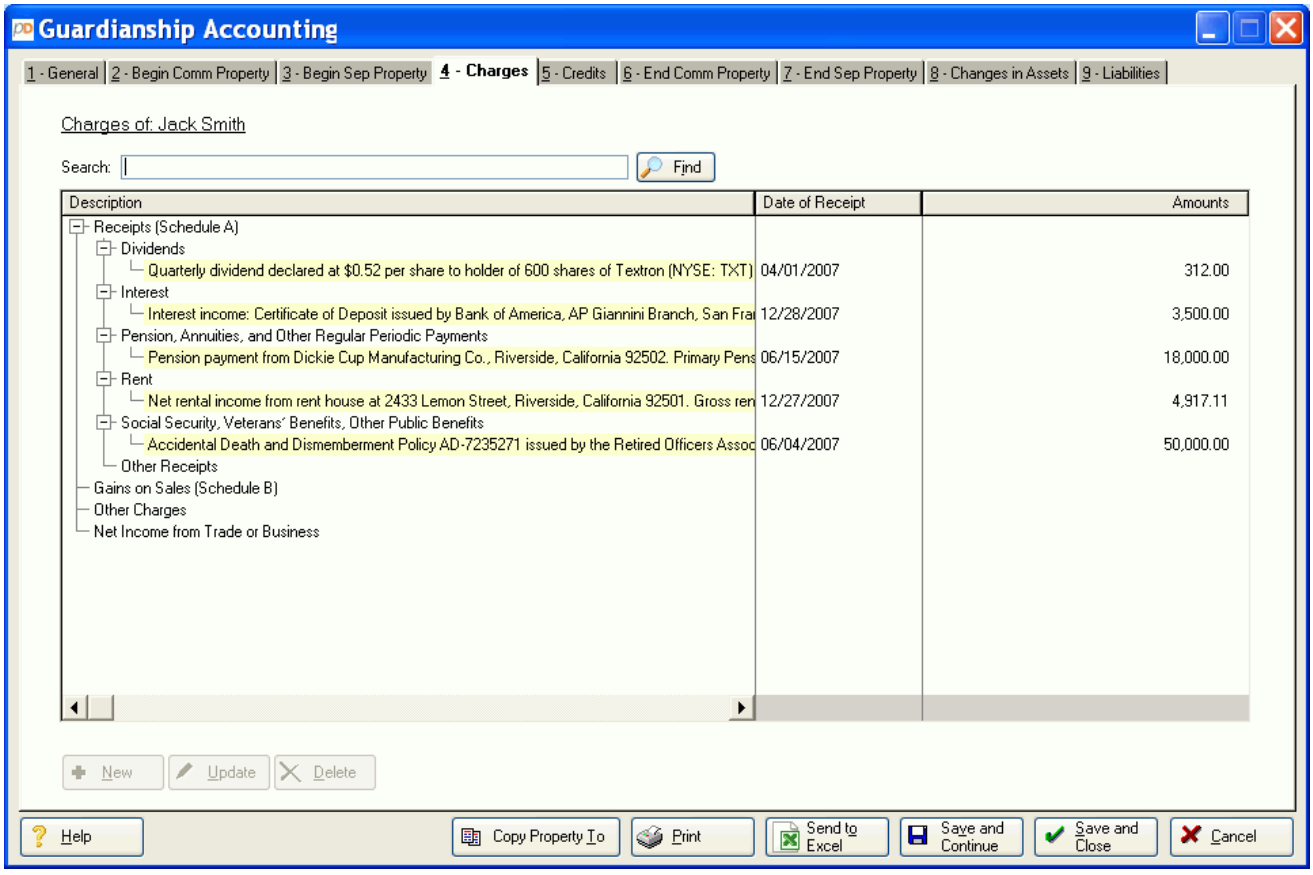

Guardianship Accounting
1 - General
2 - Begin Comm Property
3 - Begin Sep Property
4 - Charges
5 - Credits
6 - End Comm Property
7 - End Sep Property
8 - Changes in Assets
9 - Liabilities
Charges of: Jack Smith
Search:
Find
Description
Date of Receipt
Amounts
Receipts (Schedule A)
Dividends
Quarterly dividend declared at $0.52 per share to holder of 600 shares of Textron (NYSE: TXT) 04/01/2007 312.00
Interest
Interest income: Certificate of Deposit issued by Bank of America, AP Giannini Branch, San Fra 12/28/2007 3,500.00
Pension, Annuities, and Other Regular Periodic Payments
Pension payment from Dickie Cup Manufacturing Co., Riverside, California 92502. Primary Pens 06/15/2007 18,000.00
Rent
Net rental income from rent house at 2433 Lemon Street, Riverside, California 92501. Gross ren 12/27/2007 4,917.11
Social Security, Veterans' Benefits, Other Public Benefits
Accidental Death and Dismemberment Policy AD-7235271 issued by the Retired Officers Assoc 06/04/2007 50,000.00
Other Receipts
Gains on Sales (Schedule B)
Other Charges
Net Income from Trade or Business
New
Update
Delete
Help
Copy Property To
Print
Send to Excel
Save and Continue
Save and Close
Cancel

Figure 7, Charges Form

The **Charges Form** collects information on all charges received during the accounting period that are not shown on the beginning inventory. Charges are payments received from all sources, including income from trade or business, dividends, interest, pensions, rent, Social Security or other benefits, and gains on sales.

If the entries involve gains on sales of assets or other adjustments to the carrying values of assets, they should be entered on Schedule B (at the bottom of this form).

Scroll down or click the links to jump to the help section in this topic you want to see:

How Charges are Displayed 183
Locating Charge Descriptions 184
Entering Charges 184
Using Toolbar Buttons 185

How Charges are Displayed

The information for each charge is displayed in three columns: **Description**, **Date of Receipt**, and **Amounts**

Entries of actual charges are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Charge Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Receipts (Schedule A)**, and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching charge item will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Description** column.

Entering Charges

This is a general overview of the steps to enter charges. For specific help on various types of charge entries, click the **Help** button on each charge entry screen.

To enter data on the **Charges Form**, perform the following steps:

1. Double-click a charge description, right click a description and select **New Charge Item**, or click a description once and click the **New** button on the toolbar.
2. A window appears, titled with the description you chose. It will display the entry fields appropriate for the charge item. When the cursor is placed in a field, a message appears with explanatory information regarding the information that should be entered.
3. Complete the displayed fields for the charge item. These will vary according to the type of charge you are entering.
4. In the **Description** field, enter a complete description of the charge item.
5. In the **Comment** section, enter any relevant information which might aid in identifying the charge item.
6. Enter the **Date of Receipt** for each entry in mm/dd/yyyy format or use the calendar icon to use the **calendar tool** 207 to add a date.
7. In the **Amount** section, enter the amount of the received payment. The program will convert whole dollar entries to currency format for you.
8. For **Gains on Sales (Schedule B)** assets, use the **Sale Price**, **Carry Value**, and **Gain** fields to compute the net value received on the sale.

   For **Net Income From Trade or Business**, use the fields for the **Name of Business** and, in another **Business Transactions** window, use the fields for **Description** of the transaction, **Comment**, **Date of Transaction**, and **Amount**.
9. When you are finished, either click the **Add Another** button to enter another charge item in the same category or click the **OK** button to return to the **Charges Form**. The descriptions and amounts will be listed here.
10. You may edit an entry by double-clicking it, or right-clicking a charge item entry and clicking **Update Charges**, or by clicking it and clicking the **Update** button on the toolbar.
11. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking a charge entry and clicking **Delete Charges**.
12. You may copy a charge item entry to other minors by right clicking an entry and selecting **Copy**

Charge. A **Minor Selection** window appears and you can **Select Minor(s) For Whom You Want to Copy Accounting Information**. After selecting all or selected names, click **OK** and a **Copy Complete** box appears with the message, **The selected item has been successfully copied from [Minor name] to the minor(s) you selected**. Click **OK** and you are returned to the **Charges Form**. Also, you may copy entire lists of charges, credits, and assets to another minor by selecting **Copy Property To** on the toolbar.

Using Toolbar Buttons

First, find and click the line containing the charge item. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to a charge item.

Update - Modify a highlighted charge item.

Delete - Remove a highlighted charge item.

Charges Overview

Asset description categories which qualify as charge items are shown below. Since the entry fields vary considerably across these windows, please click the **Help** button on each asset window for detailed help with entering information for the charge item.

Dividends

Interest

Pensions, Annuities, and Other Regular Periodic Payments

Rental Income

Social Security, Veterans, Other Public Benefits

Other Receipts

Gains on Sales

Other Charges

Net Income From Trade or Business

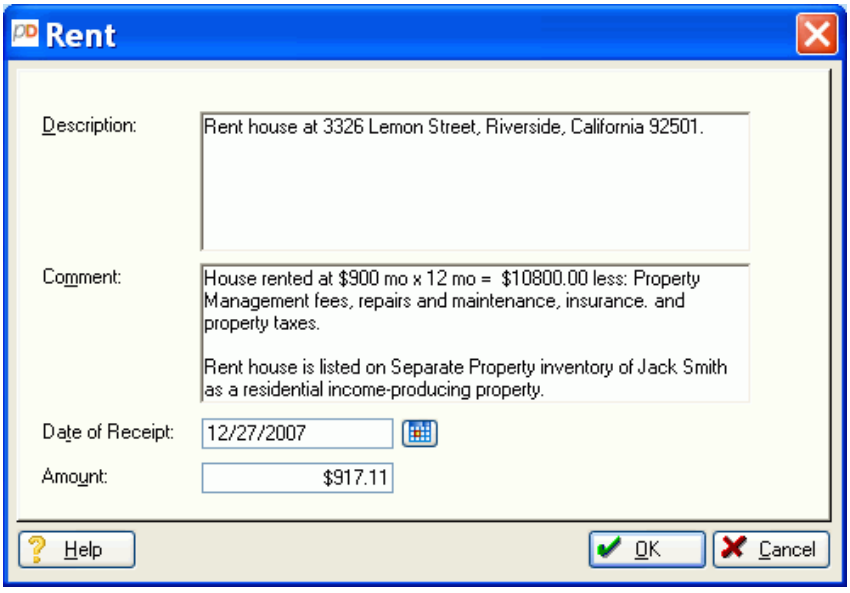

Rent
Description:
Rent house at 3326 Lemon Street, Riverside, California 92501.
Comment:
House rented at $900 mo x 12 mo = $10800.00 less: Property Management fees, repairs and maintenance, insurance. and property taxes.
Rent house is listed on Separate Property inventory of Jack Smith as a residential income-producing property.
Date of Receipt:
12/27/2007
Amount:
$917.11
Help
OK
Cancel

Figure 8, Rental Income

To enter new charge receipts or update existing receipt descriptions in this category, perform the following steps:

1. In the **Description** field, enter a description of the charge item. Click the **Help** button to see a detailed description of required entries for each type of receipt.
2. In the **Comment** section add any information you feel would help in understanding the information in any of the fields.
3. Enter the **Date of Receipt** of the payment in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** 207 calendar tool.
4. Enter the **Amount** of this receipt. The program will convert whole dollar entries to currency format for you.

Button Descriptions and Functions

Help - Click this button to see help on completing this charge window.

Add Another - This button will only appear when you are adding a new charge item. Click this button to add another charge of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Credits Form

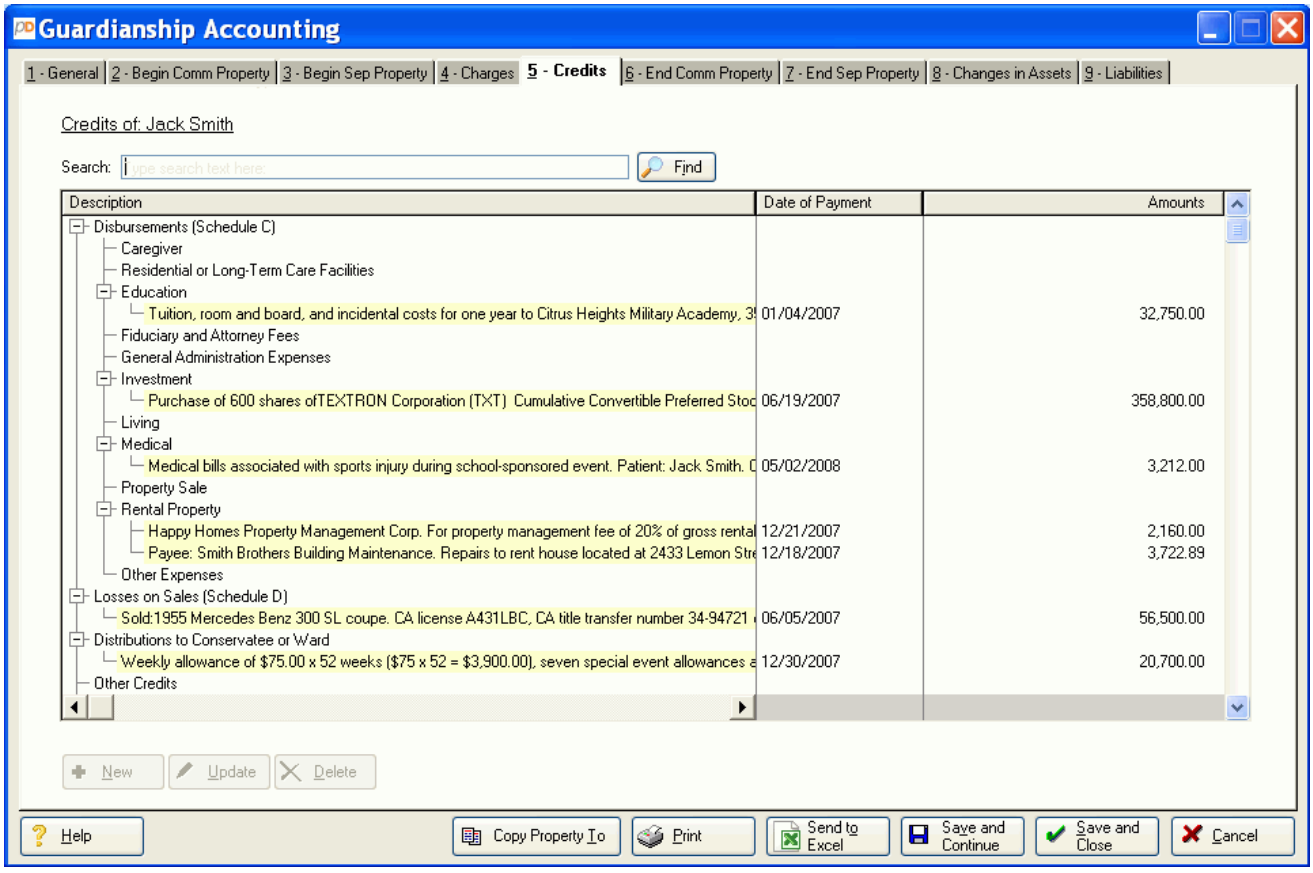

Guardianship Accounting
1 - General
2 - Begin Comm Property
3 - Begin Sep Property
4 - Charges
5 - Credits
6 - End Comm Property
7 - End Sep Property
8 - Changes in Assets
9 - Liabilities
Credits of: Jack Smith
Search:
Find
Description
Date of Payment
Amounts
Disbursements (Schedule C)
Caregiver
Residential or Long-Term Care Facilities
Education
Tuition, room and board, and incidental costs for one year to Citrus Heights Military Academy, 3 01/04/2007 32,750.00
Fiduciary and Attorney Fees
General Administration Expenses
Investment
Purchase of 600 shares ofTEXTRON Corporation (TXT) Cumulative Convertible Preferred Stoc 06/19/2007 358,800.00
Living
Medical
Medical bills associated with sports injury during school-sponsored event. Patient: Jack Smith. C 05/02/2008 3,212.00
Property Sale
Rental Property
Happy Homes Property Management Corp. For property management fee of 20% of gross rental 12/21/2007 2,160.00
Payee: Smith Brothers Building Maintenance. Repairs to rent house located at 2433 Lemon Stre 12/18/2007 3,722.89
Other Expenses
Losses on Sales (Schedule D)
Sold:1955 Mercedes Benz 300 SL coupe. CA license A431LBC, CA title transfer number 34-94721 06/05/2007 56,500.00
Distributions to Conservatee or Ward
Weekly allowance of $75.00 x 52 weeks ($75 x 52 = $3,900.00), seven special event allowances a 12/30/2007 20,700.00
Other Credits
New
Update
Delete
Help
Copy Property To
Print
Send to Excel
Save and Continue
Save and Close
Cancel

Figure 9, Credits Form

The **Credits Form** collects information all disbursements, distributions, losses on sales, other credits, or net loss from trade or business occurring during the accounting period that are not shown on the beginning inventory.

If the entries involve losses on the sale of assets or adjustments to the carrying values of assets, they should be entered on Schedule D (at the bottom of this form).

Scroll down or click the links to jump to the help section in this topic you want to see:

How Credits are Displayed 187

Locating Credit Descriptions 187

Entering Credits 188

Using Toolbar Buttons 189

How Credits are Displayed

The information for each credit is displayed in three columns: **Description**, **Date of Payment**, and **Amounts**

Entries of actual credits are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Credit Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Disbursements,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Description** list.

Entering Credits

This is a general overview of the steps to enter credits. For specific help on various types of credit entries, click the **Help** button on each credit entry screen.

1. Double-click a credit description, right click a description and select **New Credit**, or click a description once and click the **New** button on the toolbar.
2. A window will appear titled with the description you chose. It will display the entry fields appropriate for the credit. When the cursor is placed in a field, a message appears with explanatory information regarding the information that should be entered.
3. Complete the displayed fields for the credit. These will vary according to the type of credit you are entering.
4. In the **Description** field, enter a complete description of the credit.
5. In the **Comment** section, enter any relevant information which might aid in identifying the credit.
6. Enter the **Date of Payment** in mm/dd/yyyy format or use the calendar icon to use the **Select a Date** 207 calendar tool.
7. Enter the **Amount** of the payment. The program will convert whole dollar entries to currency format for you.
8. For **Losses on Sales (Schedule D)** assets, use the **Carry Value**, **Sale Price**, and **Amount of Loss** fields to compute the amount of loss on the sale.

   For payments for **Fiduciary and Attorney Fees** and **Distributions to Minor**, provide the **Date of Order** authorizing each distribution.
9. When you are finished, either click the **Add Another** button to enter another credit in the same category or click the **OK** button to return to the **Credits Form**. The descriptions and amounts will be listed here.
10. You may edit an entry by double-clicking it, right click a description and select **Update Credit**, or by clicking it and clicking the **Update** button on the toolbar.
11. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking a credit entry and clicking **Delete Credit**.
12. You may copy a credit entry to other minors by right clicking the entry and selecting **Copy Credit**. A **Minor Selection** window appears and you can **Select Minor(s) For Whom You Want to Copy Accounting Information**. After selecting all or selected names, click **OK** and a **Copy Complete** box appears with the message, **The selected credit item has been successfully copied from [Minor name] to the minor(s) you selected**. Click **OK** and you

are returned to the **Credits Form**. Also, you may copy entire lists of credits and assets to another minor by selecting **Copy Property To** on the toolbar.

Using Toolbar Buttons to Work With Credits

First, find and click the line containing the credit. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to a credit entry.

Update - Modify a highlighted credit.

Delete - Remove a highlighted credit.

Credits Overview

Asset description categories which qualify as **Credits Form** disbursements are shown below. Since the entry fields vary considerably across these credit windows, please click the **Help** button on each credit window for detailed help with entering information for the disbursement.

Caregiver

Residential or Long-Term Care Facilities

Education

Fiduciary and Attorney Fees

General Administration

Investments

Living Expenses

Medical Expenses

Sale of Property

Rental Property Expenses

Other Expenses

Losses on Sales

Distributions to Minor

Other Credits

Net Loss From Trade or Business

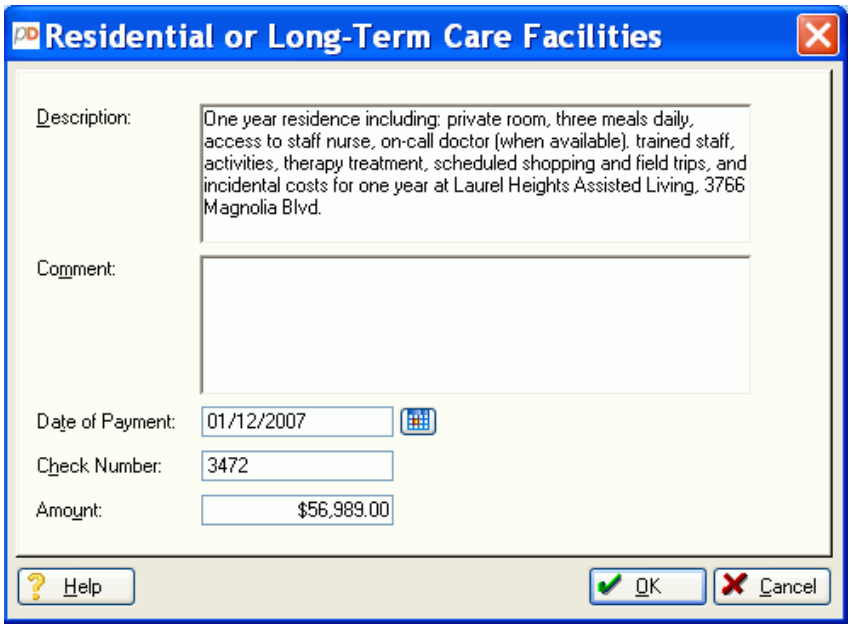

Residential or Long-Term Care Facilities
Description:
One year residence including: private room, three meals daily, access to staff nurse, on-call doctor (when available). trained staff, activities, therapy treatment, scheduled shopping and field trips, and incidental costs for one year at Laurel Heights Assisted Living, 3766 Magnolia Blvd.
Comment:
Date of Payment:
01/12/2007
Check Number:
3472
Amount:
$56,989.00
Help
OK
Cancel

Figure 10, Residential or Long-Term Care Facilities Expenses

To enter new disbursements or update existing descriptions in this category, perform the following steps:

1. In the **Description** field, enter a description of the disbursement. Click the **Help** button to see a detailed description of required entries for each type of disbursement.
2. In the **Comment** section add any information you feel would help in understanding the information in any of the fields.
3. Enter the **Date of Payment** of the disbursement in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** calendar tool.
4. Enter the **Check Number**.
5. Enter the **Amount** of this disbursement. The program will convert whole dollar entries to currency format for you.

Button Descriptions and Functions

Help - Click this button to see help on completing this window.

Add Another - This button will only appear when you are adding a new disbursement. Click this button to add another disbursement of the same type.

OK - When you are finished adding disbursement of this type, click this button to add the disbursement information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Ending Community Property Form

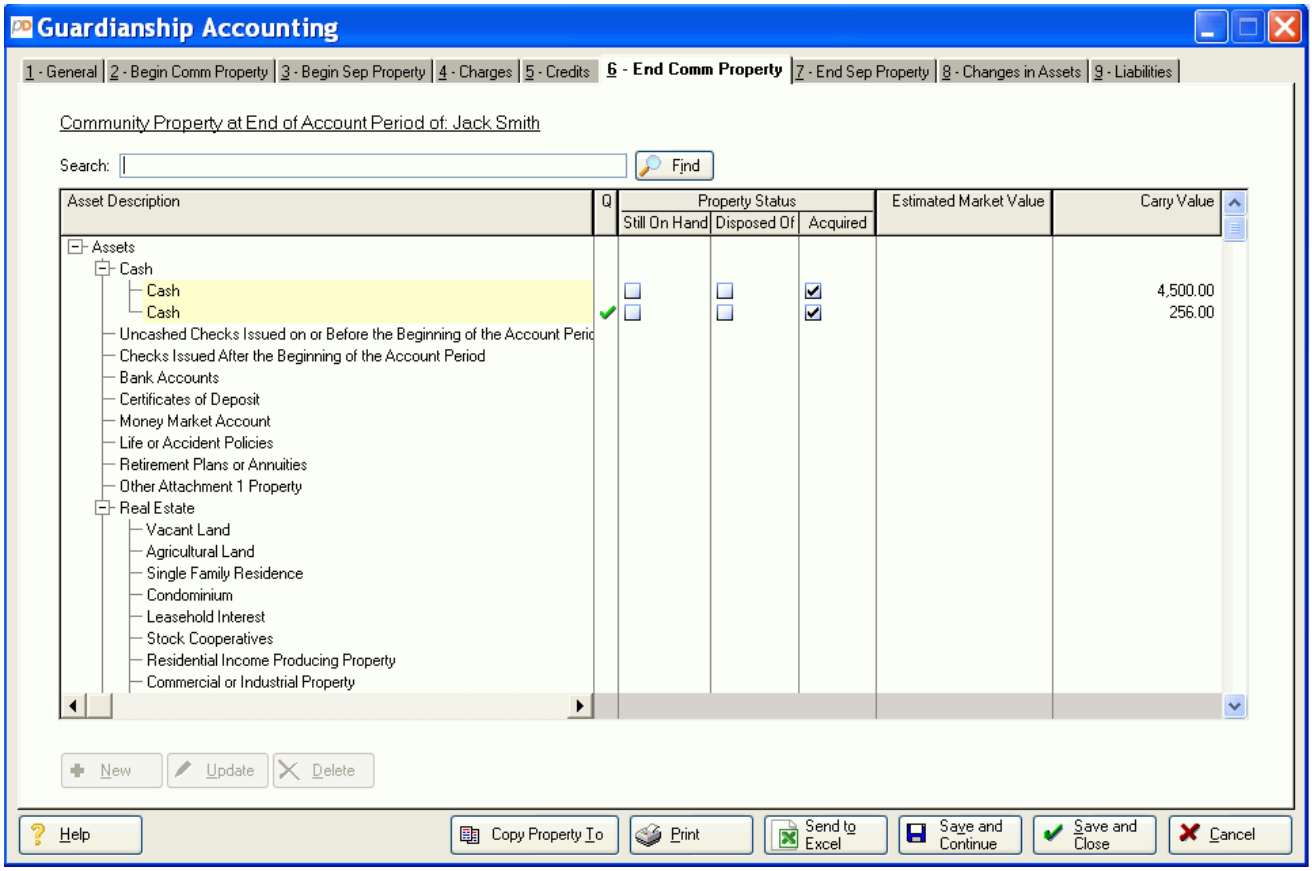


Figure 11, Ending Community Property Form

The **Ending Community Property Form** collects community property asset information as of the ending date of the accounting period. All assets appearing in the **Beginning Community Property Form** automatically appear in the **Ending Community Property Form**. If the status or condition of the asset has changed; its value appreciated or depreciated; the asset has been sold or otherwise disposed of; such asset information should be edited or updated to reflect its value as of the ending date of the accounting period.

Schedule E (Attachment 1) cash-type assets are assets that may be appraised by the guardian and listed on Attachment 1 of the inventory. All other non-cash assets must be appraised by a probate referee and listed on Attachment 2 of the inventory and appraisal. List all non-cash assets, group them by the inventory in which their latest appraised values appear, or if none, as after-acquired assets in order of their purchase dates.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 191

Locating Asset Descriptions 192

Entering Assets 192

Using Toolbar Buttons 192

How Assets are Displayed

The information for each asset or property is displayed in three columns: **Asset Description**, **Q** (Quasi-Community Property, identified by a green check mark), **Property Status** (**Still on Hand**, **Disposed of**, and **Acquired**), **Estimated Market Value**, and **Carry Value**.

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

All of the assets listed in the **Beginning Community Property Form** are automatically entered in this **Ending Community Property Form**. Likewise, All of the assets listed in the **Beginning Separate Property Form** are automatically listed in the **Ending Separate Property Form**.

See the **Entering Assets** procedure in the **Beginning Community Property Form** for a general overview of the steps to enter assets.

Using Toolbar buttons to work with Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to an asset entry.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Ending Separate Property Form

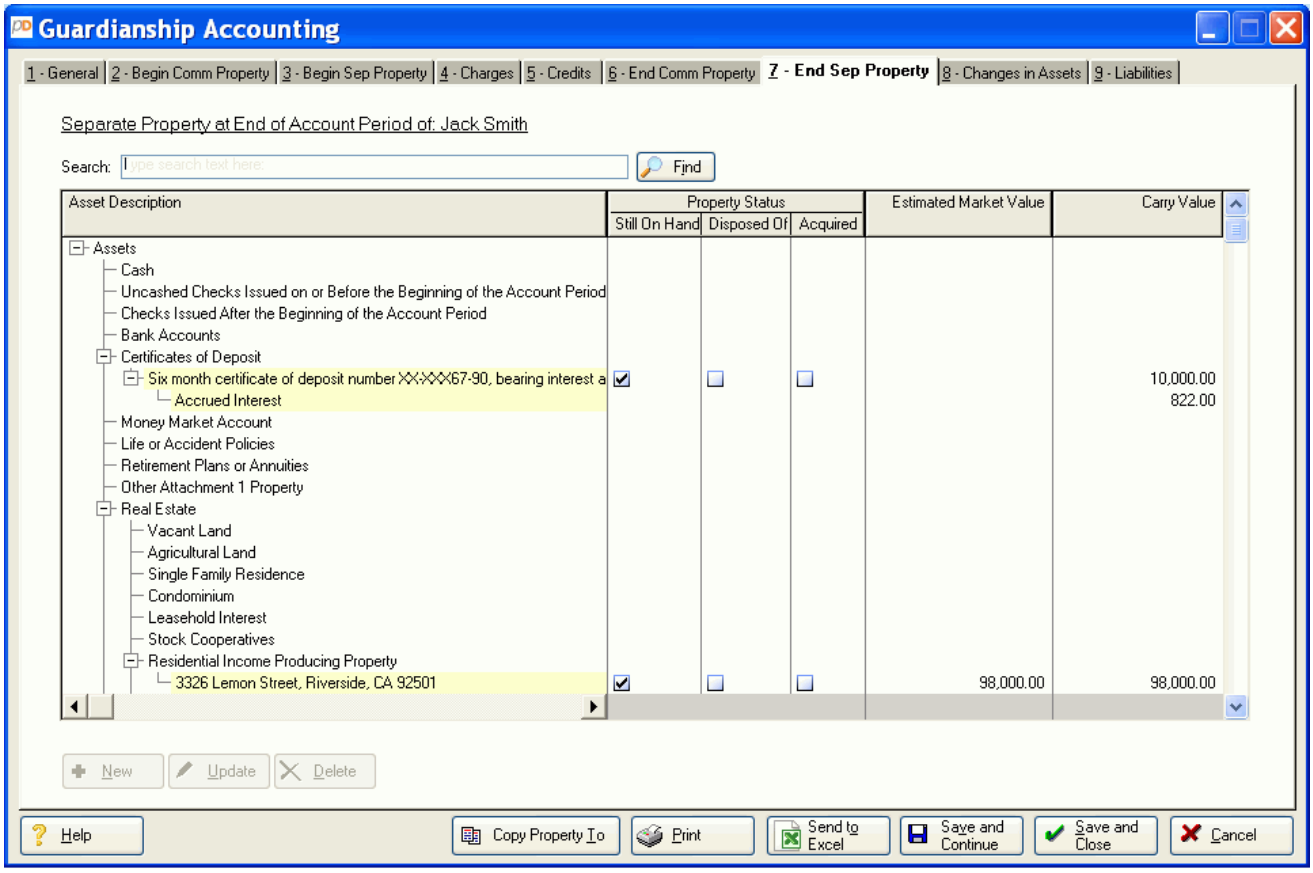


Figure 12, Ending Separate Property Form

The **Ending Separate Property Form** collects community property asset information as of the ending date of the accounting period. All assets appearing in the **Beginning Separate Property Form** automatically appear in the **Ending Separate Property Form**. If the status or condition of the asset has changed; its value appreciated or depreciated; the asset has been sold or otherwise disposed of; such asset information should be edited or updated to reflect its value as of the ending date of the accounting period.

Schedule E (Attachment 1) cash-type assets are assets that may be appraised by the guardian and listed on Attachment 1 of the inventory. All other non-cash assets must be appraised by a probate referee and listed on Attachment 2 of the inventory and appraisal. List all non-cash assets, group them by the inventory in which their latest appraised values appear, or if none, as after-acquired assets in order of their purchase dates.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 193
Locating Asset Descriptions 194
Entering Assets 194
Using Toolbar Buttons 194

How Assets are Displayed

The information for each asset or property is displayed in three columns: **Asset Description**, **Property Status** (**Still on Hand**, **Disposed of**, and **Acquired**), **Estimated Market Value**, and **Carry Value**.

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

All of the assets listed in the **Beginning Community Property Form** are automatically entered in the **Ending Community Property Form**. Likewise, All of the assets listed in the **Beginning Separate Property Form** are automatically listed in this **Ending Separate Property Form**.

See the **Entering Assets** procedure in the **Beginning Community Property Form** for a general overview of the steps to enter assets.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value, and any other necessary information to an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Changes in Asset

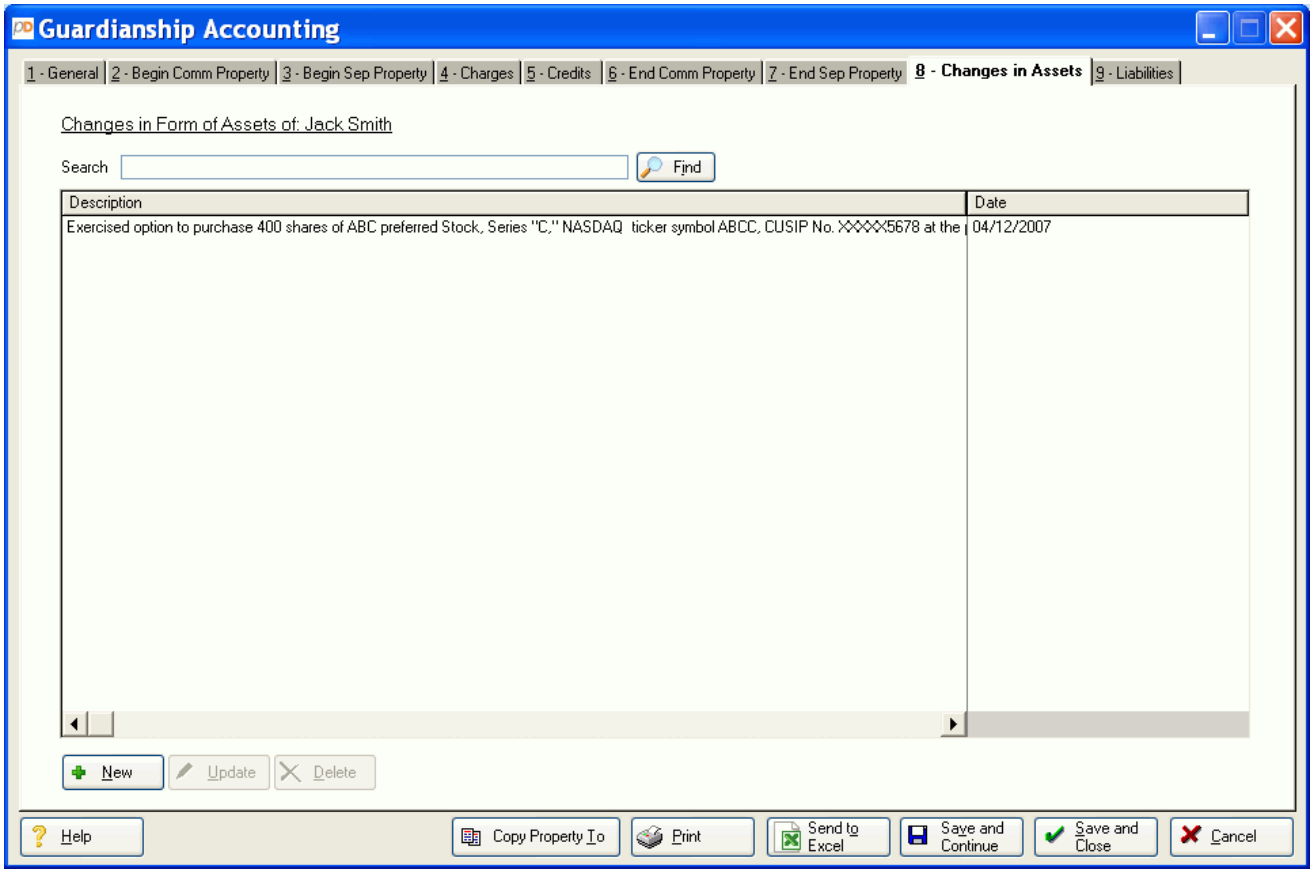


Figure 13, Changes in Asset Form

This form allows you to record all transactions that changed the form of assets during the accounting period. If the entries reflect changes in asset values, they should also be recorded in one of the appropriate forms (**Charges Form**, **Credits Form**, **Ending Community Property Form**, or **Ending Separate Property Form**).

Click **New** to enter information on changes in the form of assets. The **Changes in Form of Asset During Accounting Period** 195 window appears.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value, and any other necessary information to an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Changes in Form of Asset During Accounting Period

The **Changes in Form of Asset During the Accounting Period** window is where you record transactions that affect a change in the form of an asset. These are transactions that may report damage to an asset, appreciation or depreciation over time, zoning, condemnation, purchases of assets, or other

proceedings that affect the form of an asset.

To record entries in the **Changes in Form of Asset During the Accounting Period** fields, perform the following steps:

1. In the **Description** field, enter all available information concerning the change. For example: Purchase of an additional 400 shares of ABC preferred Stock, Series "C," NASDAQ ticker symbol ABCC, CUSIP No. XXXXX5678 at the price of $172.50/share, plus $15 brokerage transaction fee.
2. In the **Comment** section add any information you feel would help in understanding the change in the form of the asset information in any of the fields. For example: This increases the number of shares held to 500 shares. This transaction is also recorded on the Credits Form in the asset titled "Investments."
3. Enter the **Date** in mm/dd/yyyy format or click the calendar icon to easily **Select a Date** 207 from a pop-up calendar.

Button Descriptions and Functions

Help - Click this button to see help on completing this window.

Add Another - This button will only appear when you are adding a new liability. Click this button to add another liability.

OK - When you are finished adding liabilities of this type, click this button to add the information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Attachment 1 Property

Attachment 1 Property Overview

Cash assets are assets that may be appraised by the guardian and listed on Attachment 1 of the Inventory and Appraisal. Cash items can be immediately converted to cash on a dollar for dollar basis (meaning the value does not fluctuate). Rare coins or currency are not Attachment 1 items.

Asset description categories which qualify as **Attachment 1 Property** are shown below. Since the entry fields vary considerably across these asset windows, please click the **Help** button on each asset window for detailed help with entering information for the asset.

Cash

Uncashed Checks Issued On or Before the Beginning of the Account Period

Bank Accounts

Certificates of Deposit

Money Market Account

Life or Accident Policies Paid to Estate in Lump Sum

Retirement Plans or Annuities Paid to Estate in Lump Sum

Other Attachment 1 Property

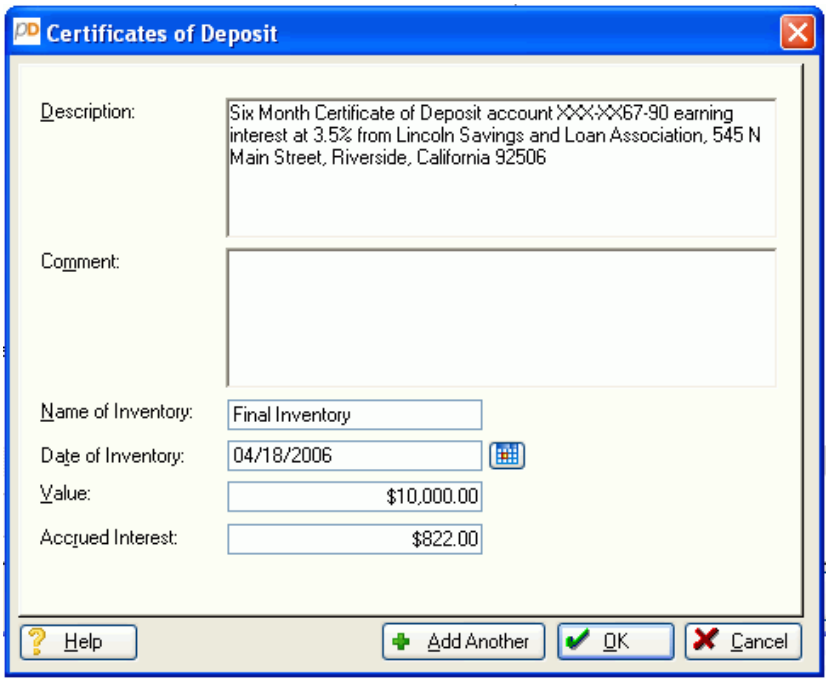


Figure 15, Certificate of Deposit

Button Descriptions and Functions

Help - Click this button to see help on completing specific asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Real Estate Assets

Real Estate Assets Overview

Asset description categories in the **Real Estate** listing are shown below. Scroll down to **Entering Asset Information** to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Vacant Land
Agricultural Land
Single Family Residence
Condominium
Leasehold Interest
Stock Cooperatives
Residential Income Producing Property
Commercial or Industrial Property
Life Estate
Remainder and Reversionary Interest
Time Share Interest
Other Real Estate

If a real estate asset doesn't fit into any other category, enter the asset in the **Other Real Estate** category.

Entering Asset Information.

The asset description window opens with seven fields for entering data: the **Property Address**, **Property Description**, **Comment**, **Name of Inventory**, **Date of Inventory**, **Estimated Market Value**, and **Carry Value**. If you are entering assets on the **Beginning Community Property Form** or the **Ending Community Property Form**, it also contains a check box for selecting Quasi-Community Property.

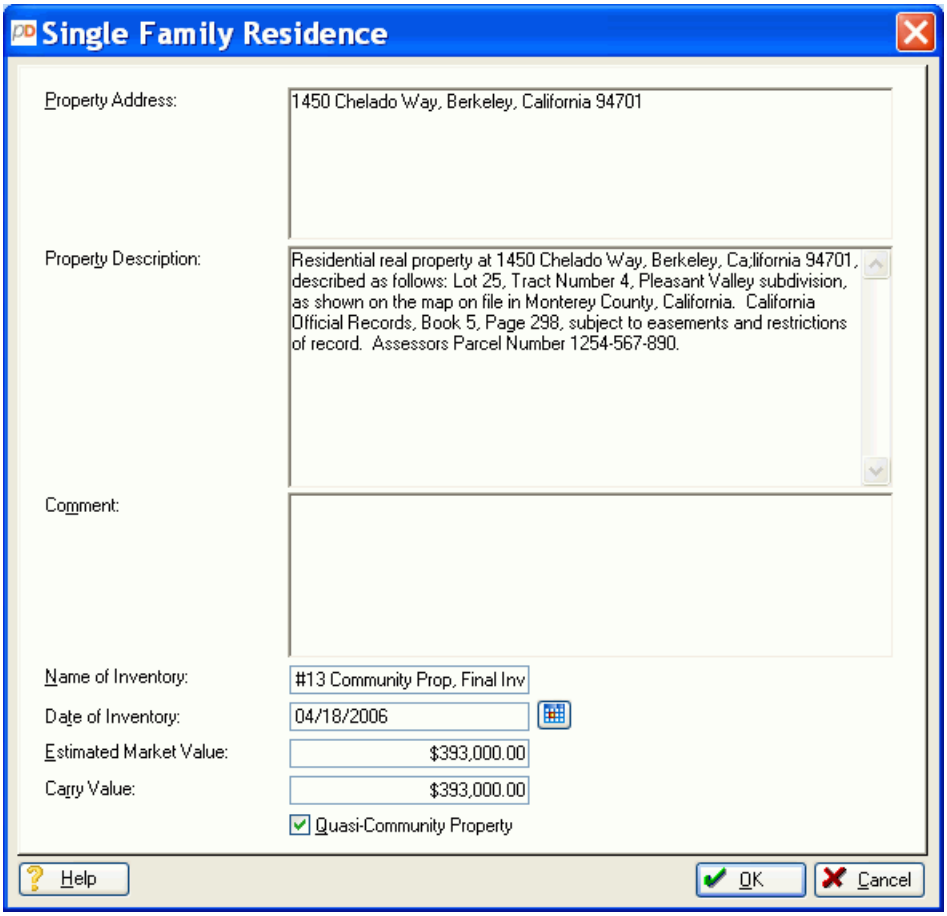

Single Family Residence
Property Address:
1450 Chelado Way, Berkeley, California 94701
Property Description:
Residential real property at 1450 Chelado Way, Berkeley, California 94701, described as follows: Lot 25, Tract Number 4, Pleasant Valley subdivision, as shown on the map on file in Monterey County, California. California Official Records, Book 5, Page 298, subject to easements and restrictions of record. Assessors Parcel Number 1254-567-890.
Comment:
Name of Inventory:
#13 Community Prop, Final Inv
Date of Inventory:
04/18/2006
Estimated Market Value:
$393,000.00
Carry Value:
$393,000.00
Quasi-Community Property
Help
OK
Cancel

Figure 16, Example Single-Family Residence

Click the **Help** button for detailed help with entering information for each asset.

Property Address - Enter the physical address of the property in line form. For example: 12 Mockingbird Street, Berkeley, CA 94704.

Property Description - Enter the complete legal description of the asset. Click the **Help** button to see a detailed description of the information required for the field.

Comment - Enter any relevant information which might further aid in identifying the asset.

Name of Inventory - List the type of inventory. For example: Final or Partial.

Date of Inventory - List the date the inventory was signed in mm/dd/yyyy format or click the calendar icon to use **Select a Date** 207 calendar tool.

Estimated Market Value - Enter the estimated market value for the property. The program will

convert whole dollar entries to currency format for you.

Carry Value - Enter the Carry Value for the property. (The carry value of an asset that is included in an inventory is its referee-appraised value. The carry value of an asset purchased for the estate after appointment of the guardian is its purchase price.)

Quasi-Community Property - This check box is only displayed when you enter assets on the **Beginning Community Property Form** or the **Ending Community Property Form**. Click the box if the real estate qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Real Estate** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Business Interests Assets

Business Interests Assets Overview

Asset description categories in the **Business Interests** listing are shown below. Scroll down to **Entering Asset Information** to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Closely Held Corporation
Limited Partnerships
General Partnerships
Sole Proprietorships
Limited Liability Companies
Other Business

If a business asset doesn't fit into any other category, enter the asset in the **Other Business** category.

Entering Asset Information

The window used for business interests assets contains six fields. If you are entering assets on the **Community Property** form, it also contains a check box.

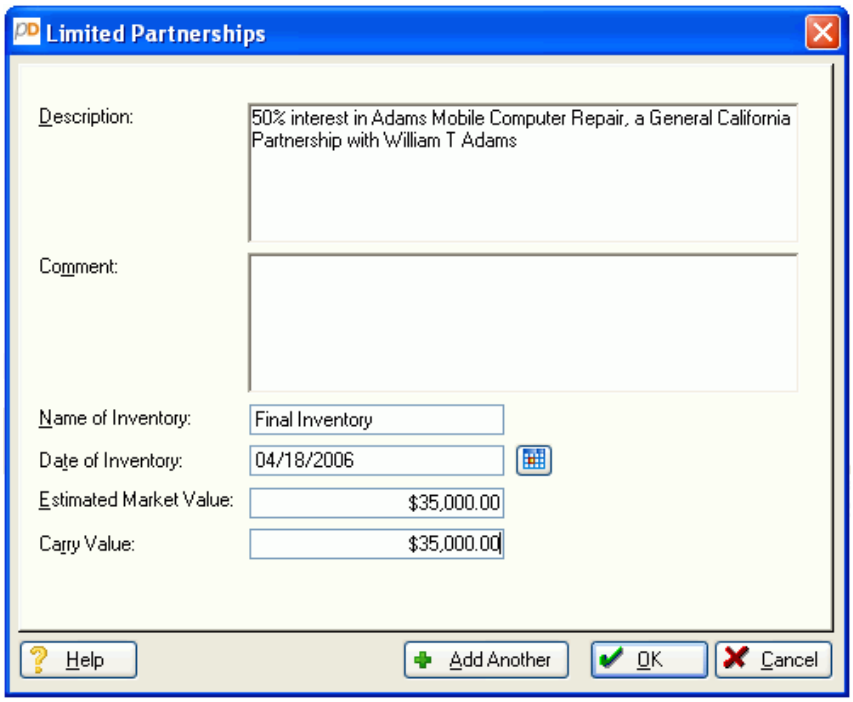


Figure 17, Limited Partnership Example

Description - Enter a description of the business interest. Click the **Help** button to see a detailed description of required entries for each business interest.

Comment - Enter any relevant information which might aid in identifying the asset.

Name of Inventory - List the type of inventory. For example: Final.

Date of Inventory - List the date the inventory was signed in mm/dd/yyyy format or click the calendar icon to use **Select a Date** 207 calendar tool.

Estimated Market Value - Enter the estimated market value for the interest. The program will convert whole dollar entries to currency format for you.

Carry Value - The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the guardian is its purchase price.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the business interest qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Business Interests** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Tangible Personal Property

Tangible Personal Property Assets Overview

Asset description categories in the **Tangible Personal Property** listing are shown below. Scroll down to **Entering Asset Information** to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Furniture, Furnishings and Miscellaneous
Jewelry
Coins or Stamps
Work of Art
Mobile Homes
Motor Vehicles
Boat, Airplane
Livestock and Breeding Animals
Other Personal Property

If a personal property asset doesn't fit into any other category, enter the asset in the **Other Personal Property** category.

Entering Asset Information

The window used for personal property assets contains five fields. If you are entering assets on the **Community Property** form, it also contains a check box.

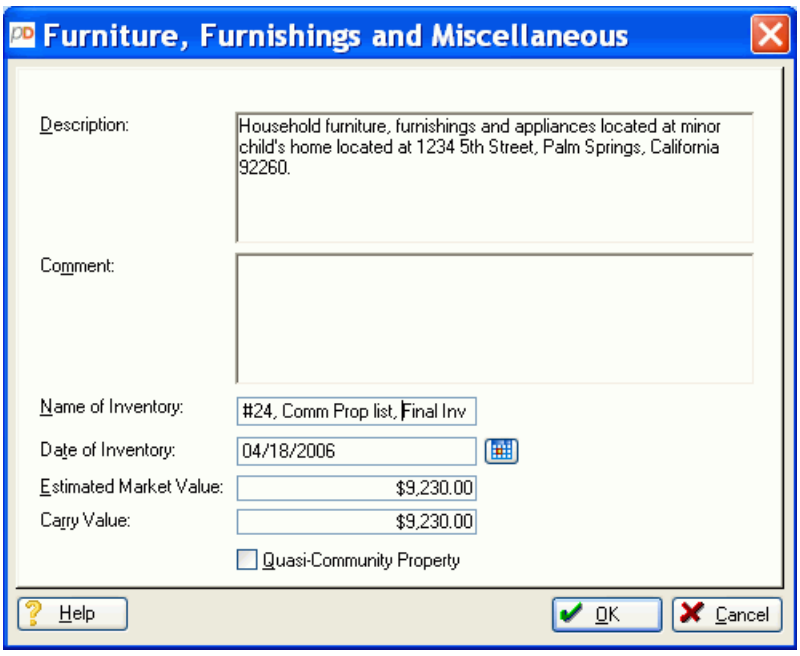


Figure 18, Example Tangible Personal Property Entries

Description - Enter a description of the property. Click the **Help** button to see a detailed description of required entries for each type of property.

Comment - Enter any relevant information which might aid in identifying the asset.

Name of Inventory - List the type of inventory. For example: Final.

Date of Inventory - List the date the inventory was signed in mm/dd/yyyy format or click the

calendar icon to use Select a Date 207 calendar tool.

Estimated Market Value - Enter the estimated market value for the asset. The program will convert whole dollar entries to currency format for you.

Carry Value - The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the guardian is its purchase price.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the personal property asset qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Tangible Personal Property** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Debt or Promissory Note

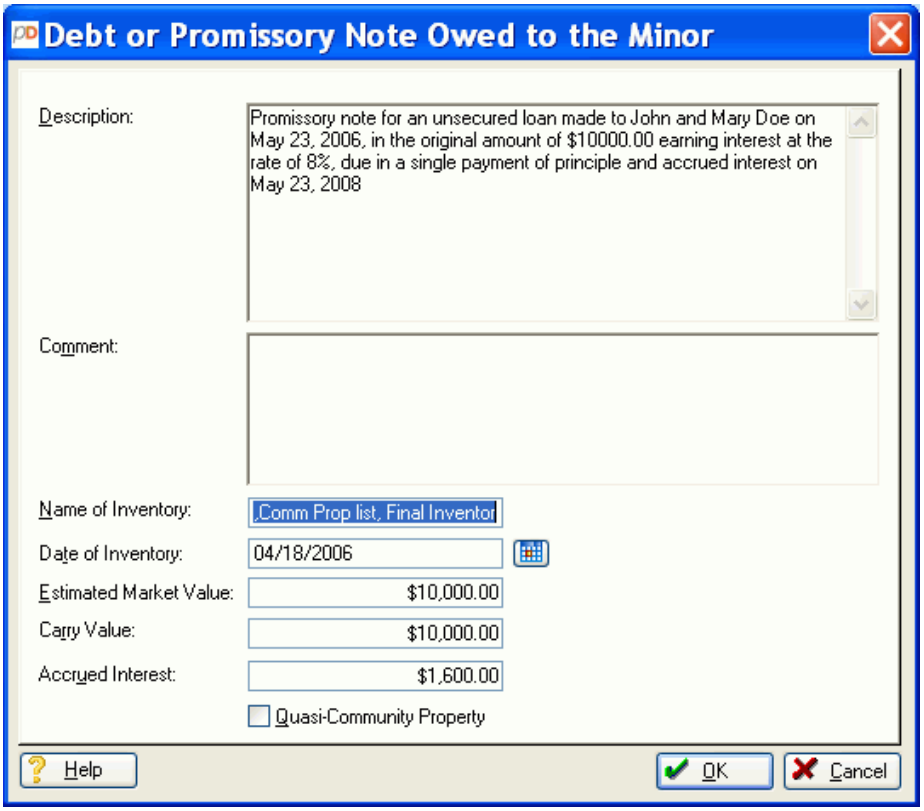

Debt or Promissory Note Owed to the Minor
Description:
Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original amount of $10000.00 earning interest at the rate of 8%, due in a single payment of principle and accrued interest on May 23, 2008
Comment:
Name of Inventory:
Comm Prop list, Final Inventor
Date of Inventory:
04/18/2006
Estimated Market Value:
$10,000.00
Carry Value:
$10,000.00
Accrued Interest:
$1,600.00
Quasi-Community Property
Help
OK
Cancel

Figure 19, Debt or Promissory Note Owed to the Minor

To enter a debt or promissory note owed to the minor, or to update existing asset descriptions in this

category, follow the steps below:

1. Enter a **Description** in the designated field. Include the terms of the note, such as the date of the debt or note and the final date due, the names of the borrowers, the original amount borrowed, the payment amount and dates of scheduled payments, the interest rate, and any security for the loan. If real property secures the loan, include either the Assessor's Parcel Number or the legal description of the property. For example: "Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original principal amount of $10,000.00, earning interest at the rate of 8%, due in a single payment of principal and accrued interest on May 23, 2008."
2. In the **Comment** section, enter any relevant information which might aid in identifying the asset.
3. In the **Name of Inventory** field, list the type of inventory. For example: Final.
4. In the **Date of Inventory** field, list the date the inventory was signed in mm/dd/yyyy format or click the calendar icon to use **Select a Date** 207 calendar tool.
5. Enter the **Estimated Market Value** for the asset. The program will convert whole dollar entries to currency format for you.
6. Enter the **Carry Value** of the asset. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the guardian is its purchase price.)
7. Enter the amount of any **Accrued Interest** for the debt or note that had accrued as of the date of appointment of the guardian but had not yet been credited.
8. If you are adding/updating an asset on the **Community Property** form, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset on the **Community Property** form after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Securities

Securities Assets Overview

Asset description categories in the **Securities** listing are shown below. Scroll down to **Entering Asset Information** to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Brokerage Accounts

Common and Preferred Stocks

Mutual Funds

Stock Options

Corporate, State and Municipal Bonds

United States Treasury Notes and Bonds

Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC) Security

United States Savings Bonds

Other Securities

If a **Securities** asset doesn't fit into any other category, enter the asset in the **Other Securities** category.

Entering Asset Information

The window used for **Securities** assets contains a varying number of fields. If you are entering assets on the **Community Property** form, it also contains a check box.

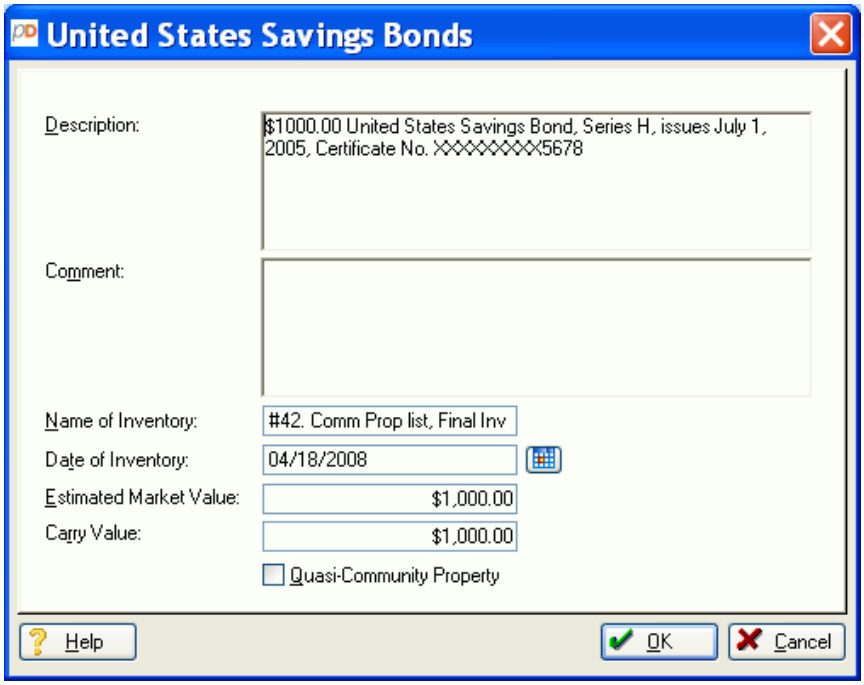


Figure 20, US Savings Bond Example

Description - Enter a description of the security. Click the **Help** button to see a detailed description of required entries for each type of security.

Comment - Enter any relevant information which might aid in identifying the asset.

Name of Inventory - List the type of inventory. For example: Final.

Date of Inventory - List the date the inventory was signed in mm/dd/yyyy format or click the calendar icon to use Select a Date 207 calendar tool.

Estimated Market Value - Enter the estimated market value for the asset. The program will convert whole dollar entries to currency format for you.

Carry Value - The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the guardian is its purchase price.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the security qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Securities** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Other Intangible and Unscheduled Property Assets

This window helps you enter assets which do not fit into any other listed category. To enter new assets or update existing asset descriptions in this category, perform the following steps:

1. Enter a **Description** of the asset in the designated field. Include a full description of intangible property not included in any of the previously described categories that was owned by the minor. For example: "Copyright and future royalty stream from 2001 book, 'The Life and Times of J.J. Schmidt', ISBN no. 1234567890, published by Narcissus Press."
2. In the **Comment** section, enter any relevant information which might aid in identifying the asset.
3. In the **Name of Inventory** field, list the type of inventory. For example: Final.
4. In the **Date of Inventory** field, list the date the inventory was signed in mm/dd/yyyy format or click the calendar icon to use **Select a Date** calendar tool.
5. Enter the **Estimated Market Value** of the stock. The program will convert whole dollar entries to currency format for you.
6. Enter the **Carry Value** of the asset. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the guardian is its purchase price.)
7. If you are adding/updating an asset on the **Beginning Community Property Form** or the **Ending Community Property Form**, the Quasi-Community Property check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Guardianship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Selecting a Case

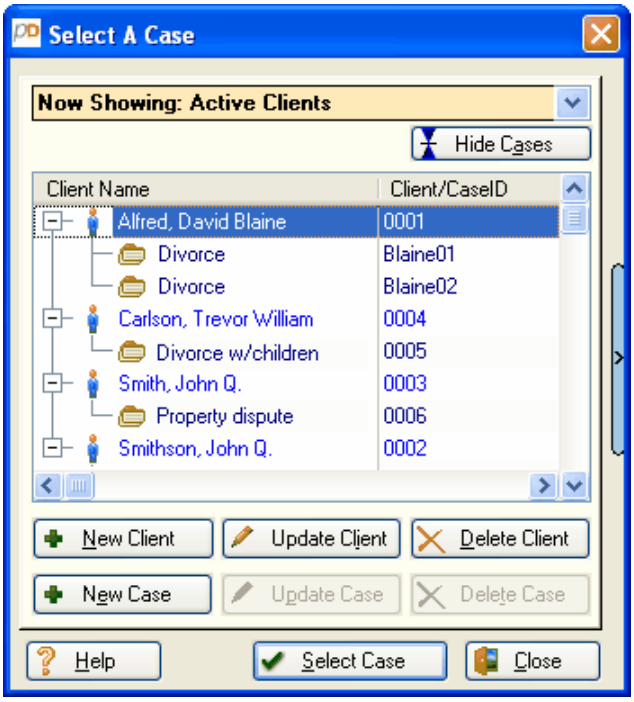


Figure 21, Selecting a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input. It lists existing ProDoc clients and all cases for the clients. You can use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click on a displayed case and then press the **Enter** key.
- Click on a displayed case and then click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients.** Other choices are **All Contacts and Cases, Closed Clients, Private Clients** and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

Selecting a Date

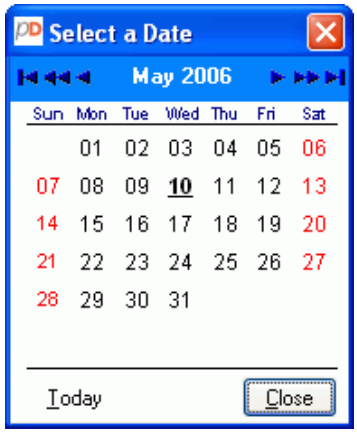


Figure 22, Select a Date Window

This window helps you quickly complete date fields. Tools and buttons on this calendar tool, depicted as Figure 22, include:

- and - Click to move back or forward one year.
- and - Click to move back or forward one month.
- and - Click to move back or forward one week.
- Use **Up** and **Down** arrow keys to move back and forward one week.
- Use **Left** and **Right** arrow keys to move back and forward one day.
- Click **Today** to move the underline/highlight to today's date.
- Click on the date to choose it or press the **Enter** key to choose the underlined date.
- Click **Cancel** to close the calendar without choosing a date.

California Conservatorship Inventory & Appraisal

Getting Started

It's easy to create inventories for your conservatorship matters with the **Conservatorship Inventory & Appraisal** program. This program completely eliminates manual calculations, simplifies your work and dramatically reduces the time necessary to handle conservatorship matters. You need to only list the necessary information once. ProDoc automatically calculates the value of the estate and prints the required form and attachments.

Starting the Program

1. Click **PowerPacks → Conservatorships → Inventory & Appraisal.**
2. The **Select a Case** 226 window opens. Select a case by double-clicking a visible case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button. Click the **Help** button on the window or click **here** 226 for detailed help for finding and selecting cases.
3. The **Conservatorship Inventory & Appraisal** program opens to the **General** tab.

Navigating the Conservatorship Inventory & Appraisal Program

There are six tabs across the top of the main program window: **General** 209, **Conservatee** 211, **Community Property** 213, **Separate Property** 215, **View Attachment 1** 217, and **View Attachment 2** 218. Each tab represents a different form. To move from one screen to another, position the cursor over the tab you want to use and click on it.

You can also use hot keys. Wherever a window, screen or field title shows an underlined character, i.e., "**Primary Attorney**", you can navigate to that entry by holding the "**Alt**" key and pressing the underlined keyboard character. In the earlier example, pressing **Alt + A** on your keyboard puts your cursor in the **Primary Attorney** field.

Help with using the Conservatorship Inventory & Appraisal Program

- Click the **Help** buttons on each window (or press the **F1** key).
- View or print the **ProDoc Software Manual.**
- View Computer Based Training (CBT) Modules at the **ProDoc Website.**
- Periodic ProDoc user seminars; schedule these at the **ProDoc Website.**
- Call our Customer Support specialists at 1-800-759-5418.
- Send email to **tech@prodoc.com.**

Main Toolbar

Figure 1, Main Toolbar

The toolbar along the bottom of each of the six major forms consists of the **Help**, **Copy Property To**, **Print**, **Send to Excel**, **Save and Continue**, **Save and Close**, and **Cancel** buttons. This toolbar is always available while you are using the program. The buttons and their actions are discussed below.

Help - Click this button to display the help topic for the form or current window.

Copy Property To - Click this button to copy lists of property assets from the current conservatee to conservatee(s) with whom you wish to share the data. A popup box opens entitles **Conservatee Selection.** Select the name of the conservatee(s) to whom you want to copy assets.

To copy a single asset to another conservatee, select an asset on the current form, right-click on the asset and select **Copy Asset**. A box opens entitled, **Conservatee Selection**. Select only the conservatee(s) to whom you want to copy the asset.

Print - Click this button to print and/or preview form GC-040, Inventory & Appraisal, and form GC-041 attachment forms. A box opens entitled, **Conservatee Selection**. Accept the selection of **All** or select only the names of conservatee(s) for whom you want to print inventories.

Send to Excel - Click this button to send all categories and amounts entered in the program to an Excel spreadsheet. A box opens titled, **Conservatee Selection**. Accept the selection of **All** or select only the names of conservatee(s) for whom you wish to export inventory data to Excel spreadsheets.

Save and Continue - Click this button to save the data that has been entered and continue working with the program.

Save and Close - Click this button to save the data that has been entered and exit the program.

Cancel - Click this button to exit the program without saving the information that you entered during the current session.

General Form

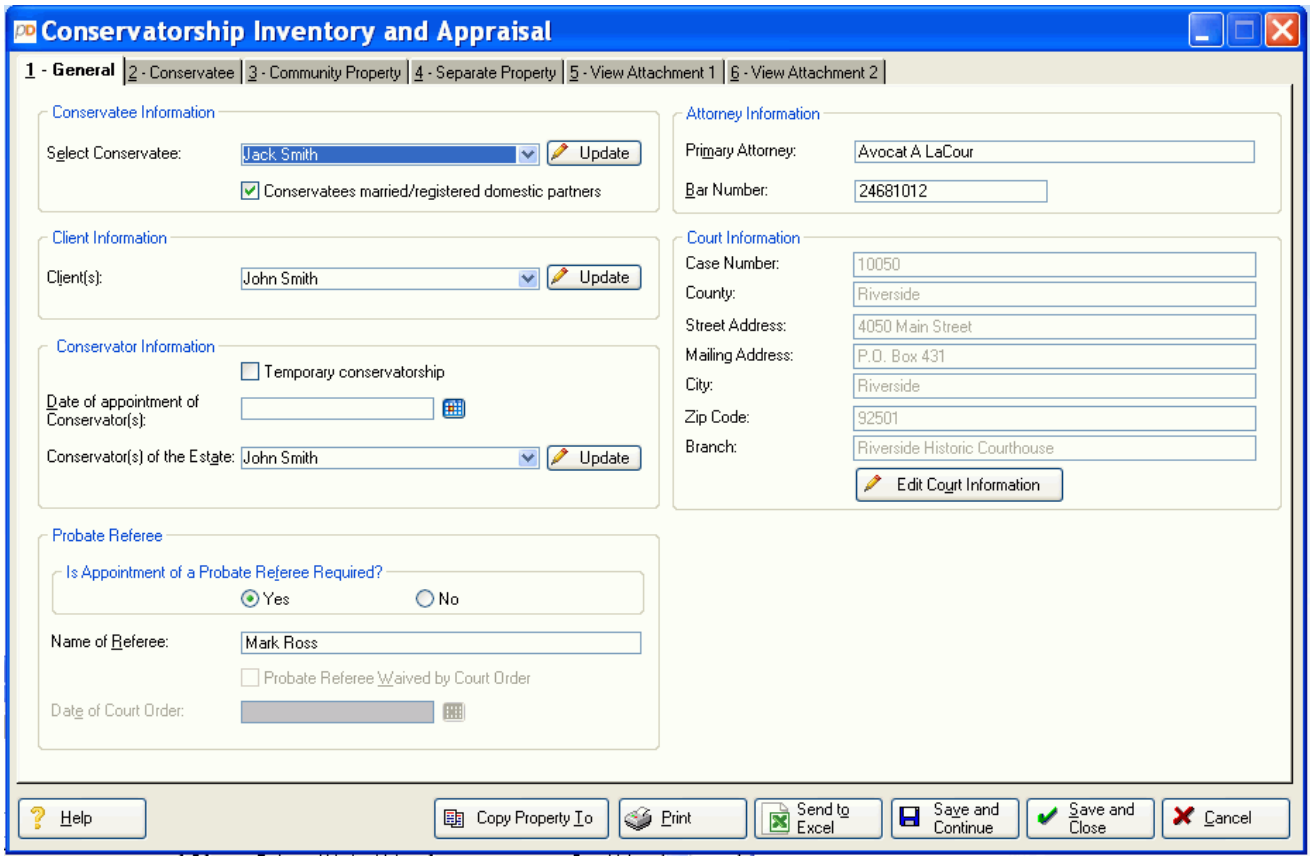


Figure 2, General Form

The **General Form** is used to enter information about the conservatee(s), the client(s), conservator(s), referee, primary attorney, and court.

Navigating through the General Form

To navigate from one field/button to another, click on the field or button you would like to use. You can also press the **Tab** key on your keyboard to move forward to the next entry and press **Shift + Tab** to move to the previous entry.

Completing the General Form

Select Conservatee - Press the **Update** button. The **Conservatee Names** popup window opens and you are prompted to **Add or Update Conservatee Name and Alias**. You can create a separate inventory for each conservatee. Use the **New**, **Update,** or **Delete** buttons to add, edit, or delete conservatee names.

Alias List - Enter any other names by which a conservatee may be known.

Client(s) - To edit the client(s) list for the case, click the **Update** button in the **Client Information** section. The **Client Names** window appears.. Use the **New**, **Update,** or **Delete** buttons to add, edit, or delete client names. The option to update or delete a client's name will not be available if the client is in your ProDoc database; you must use the **Client/Case Manager** for this. For specific help for these windows, click the **Help** button on each window.

Date of Appointment of Conservator(s) - Enter the date in mm/dd/yyyy format. You can also click the calendar icon to select the date from a calendar tool. Click **Select a Date** 227 for detailed help with this tool. If the conservatorship appointment is temporary, click the **Temporary Conservatorship** box.

Conservator(s) of the Estate - To edit the conservators list for the case, click the **Update** button. The **Conservator Names** popup window opens where you are prompted to **Add or Update the Conservator Names.**

Probate Referee Section - Enter the requested information for the **Probate Referee** if one is required.

- **Is Appointment of a Probate Referee Required? -** Click the appropriate **Yes** or **No** button.
- If **Yes** was selected, enter the name of the probate referee in the **Name of Referee** field.
- If you checked the box for **Probate Referee Waived by Court Order**, enter the **Date of Court Order** in mm/dd/yyyy format or click the calendar icon to use the Select a Date 227 calendar tool.

Attorney Information Section - Enter the **Primary Attorney's** name and **Bar Number** in the fields provided.

Court Information Section - Click the **Edit Court Information** button to open the **Court Information** window. Enter the **Case Number** and choose the **County** and **Branch.** The **Street Address, Mailing Address, City** and **Zip Code** should be automatically completed for you, depending upon your previous selections. If not, enter the information in the fields provided. Click the **Save** button when you are finished to return to the **General** form.

When you are finished entering the information on the **General Form**, click the **Save and Continue** button to save your entries and continue working, or click the **Save and Close** button to save your entries and close the **Conservatorship Inventory & Appraisal** program.

Conservatee Form

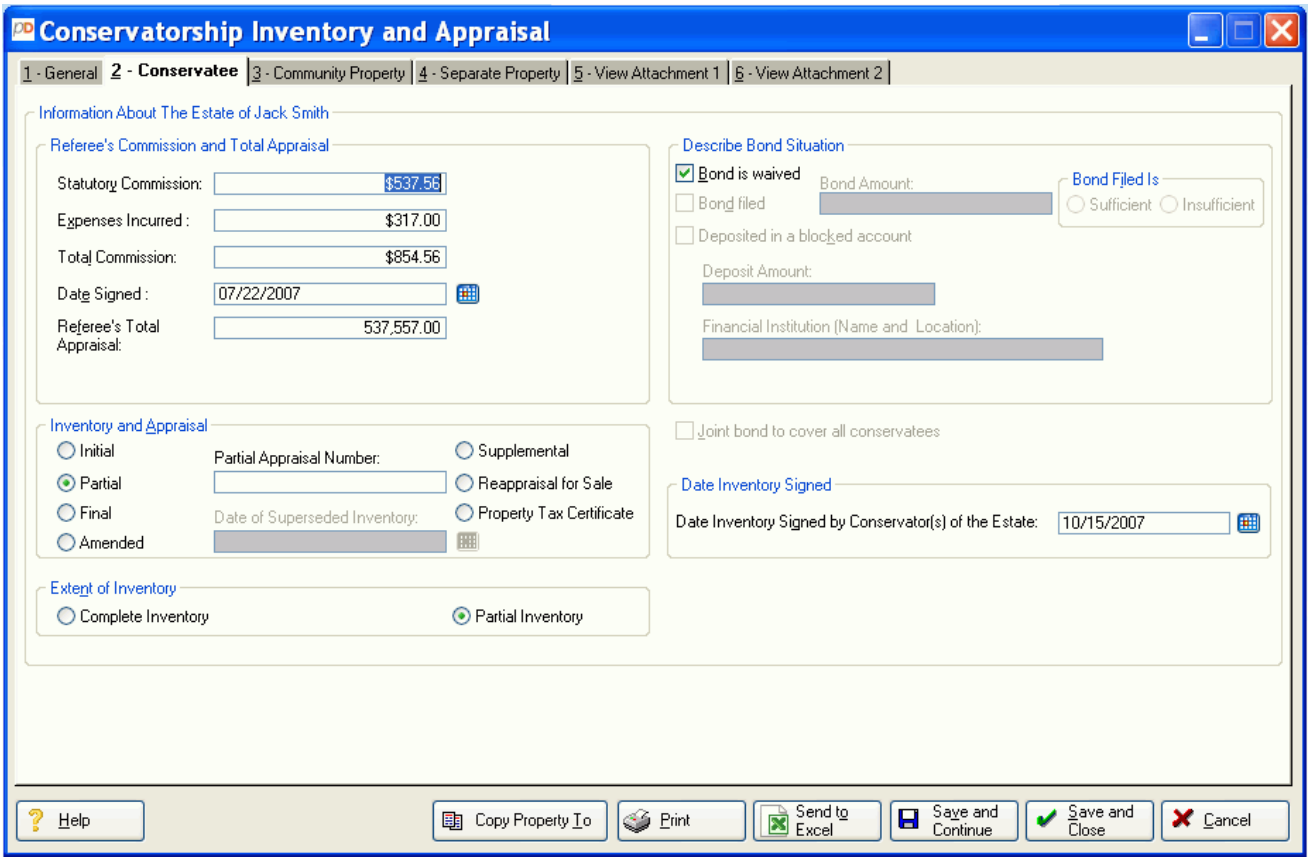


Figure 3, Conservatee Form

The **Conservatee Form** is used to enter all basic information about the referees commission, type and extent of inventory and appraisal, bond situation, and date inventory was signed by the conservator of the estate.

Navigating through the Conservatee Form

To navigate from one field/button to another, click on the field or button you would like to use. You can also press the **Tab** key on your keyboard to move forward to the next entry and press **Shift + Tab** to move to the previous entry.

Completing the Conservatee Form

Descriptions of entry fields and choices required for this form are listed below.

Referee's Commission and Total Appraisal Section

- Enter the **Statutory Commission** and **Expenses Incurred** in their respective fields. The **Total Commission** value will be automatically calculated and entered in its field.
- Enter the **Date Signed** in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** 227 calendar tool.
- Enter the amount provided by the Probate Referee for the **Referee's Total Appraisal** field for Attachment 2 property. The amount you enter here will be printed in the applicable field on the GC-040 form. If the amount entered differs from the amount calculated from your asset entries, you will be notified when you print the form.

Inventory and Appraisal Section - Click the appropriate button to indicate whether the inventory is

Initial, **Partial**, **Final**, **Amended**, **Supplemental**, a **Reappraisal for Sale**, or for **Property Tax Certificate**.

- Select **Initial** if this is the first inventory and appraisal completed since becoming conservator.
- If you select **Partial,** the **Partial Appraisal Number** field is activated. Enter a numeral representing the serial number of the appraisal (i.e. "1", "2").
- Select **Final** if this is your final inventory and appraisal.
- If you select **Amended,** the **Date of Superseded Inventory** field is activated. Enter the date of the superseded inventory.
- If you select **Supplemental** it should only contain new information. (For example, to correct the omission of one or several items that were omitted in the final inventory and appraisal.)
- Select **Reappraisal for Sale** if real property is being sold more than one year after the date of appointment of the conservator.
- Select **Property Tax Certificate** if the conservatee owned California real property and the proper change of ownership certificates have been filed as required. (If the conservatee owned no California real property on the date of appointment, this button should **not** be selected.)

Extent of Inventory Section - Click the appropriate button to indicate whether the inventory is a **Complete Inventory** or a **Partial Inventory**.

Describe Bond Situation Section - Click the appropriate button to describe the bond situation: **Bond is waived**, **Bond filed,** or bond is **Deposited in a blocked account**.

- If you choose **Bond is waived**, no further fields need to be completed in this section.
- If you choose **Bond Filed**, enter the amount in the **Bond Amount** field and click the appropriate button to indicate whether or not the **Bond Filed Is Sufficient** or **Insufficient**.
- If you choose **Deposited in a Blocked Account**, enter both the **Deposit Amount** and the name and location of the financial institution holding the deposit in the appropriate fields.

Joint bond to cover all conservatees - If a joint bond was filed on behalf of all conservatee's inventories, check the **Joint bond to cover all conservatees** box.

Date Inventory Signed Section - Enter the date the Inventory & Appraisal was signed by the conservator(s) of the estate in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** 227 calendar tool.

When you are finished entering the information on the **Conservatee Form**, click the **Save and Continue** button to save your entries and continue working, or click the **Save and Close** button to save your entries and close the **Conservatorship Inventory & Appraisal** program.

Community Property Form

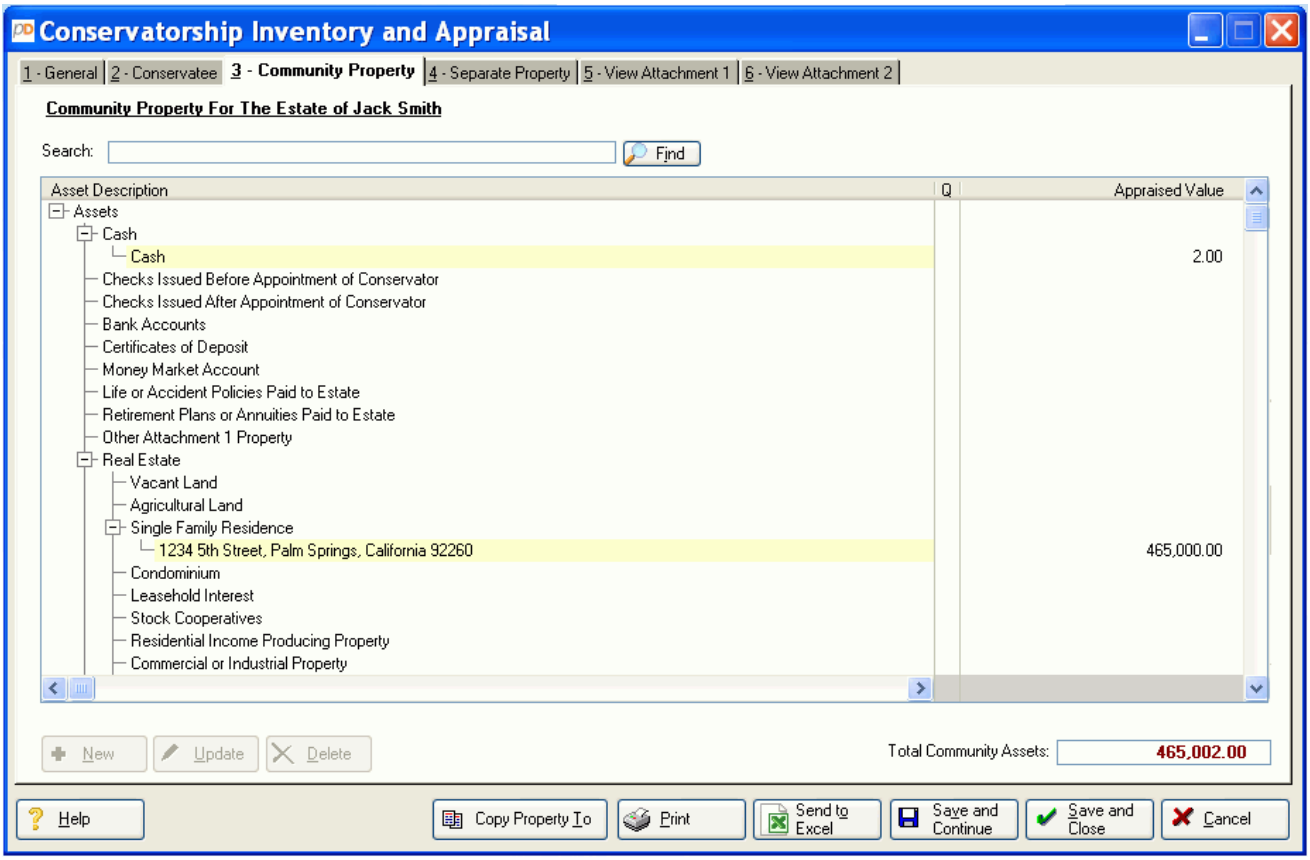


Figure 4, Community Property Form

The **Community Property Form** is used to enter details regarding estate community property.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 213

Locating Asset Descriptions 213

Entering Assets 214

Using Toolbar Buttons 214

How Assets are Displayed

The information for each asset or property is displayed in three columns: **Asset Description**, **Q** (Quasi-Community Property, identified by a green check mark), and **Appraised Value.** As you enter assets, a running total is displayed under the listing, labeled **Total Community Assets.**

Entries of actual assets are highlighted in yellow.

To view all asset descriptions,move the vertical scroll bar on the right side of the screen. To view only the main title, **Assets,** in the **Asset Description** column, click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you

wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.

- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

This is a general overview of the steps to enter assets. For specific help on various types of asset entries, click the **Help** button on each asset entry screen.

1. Double-click an asset description, right click a description and select **New Asset**, or click a description once and click the **New** button on the toolbar.
2. A window appears titled with the description you chose. It will display the entry fields appropriate for the asset.
3. Complete the displayed fields for the asset. These will vary according to the type of asset you are entering.
4. Check the box if the asset is a Quasi-Community Property.
5. When you are finished, either click the **Add Another** button to enter another asset in the same category or click the **OK** button to return to the **Community Property** form. The descriptions and amounts will be listed here.
6. You may edit an entry by double-clicking it, by right-clicking a description and selecting **Update Asset**, or by clicking it and clicking the **Update** button on the toolbar.
7. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking an asset entry and clicking **Delete Asset**.
8. You may copy an entry to other conservatees by right clicking an entry and selecting **Copy Asset**. A **Conservatee Selection** window appears and you can select the conservatee(s) to whom you wish to copy the asset. Also, you may copy entire lists of assets to another conservatee by selecting **Copy Property To** on the toolbar.

Using Toolbar Buttons to work with Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to an asset entry in the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Separate Property Form

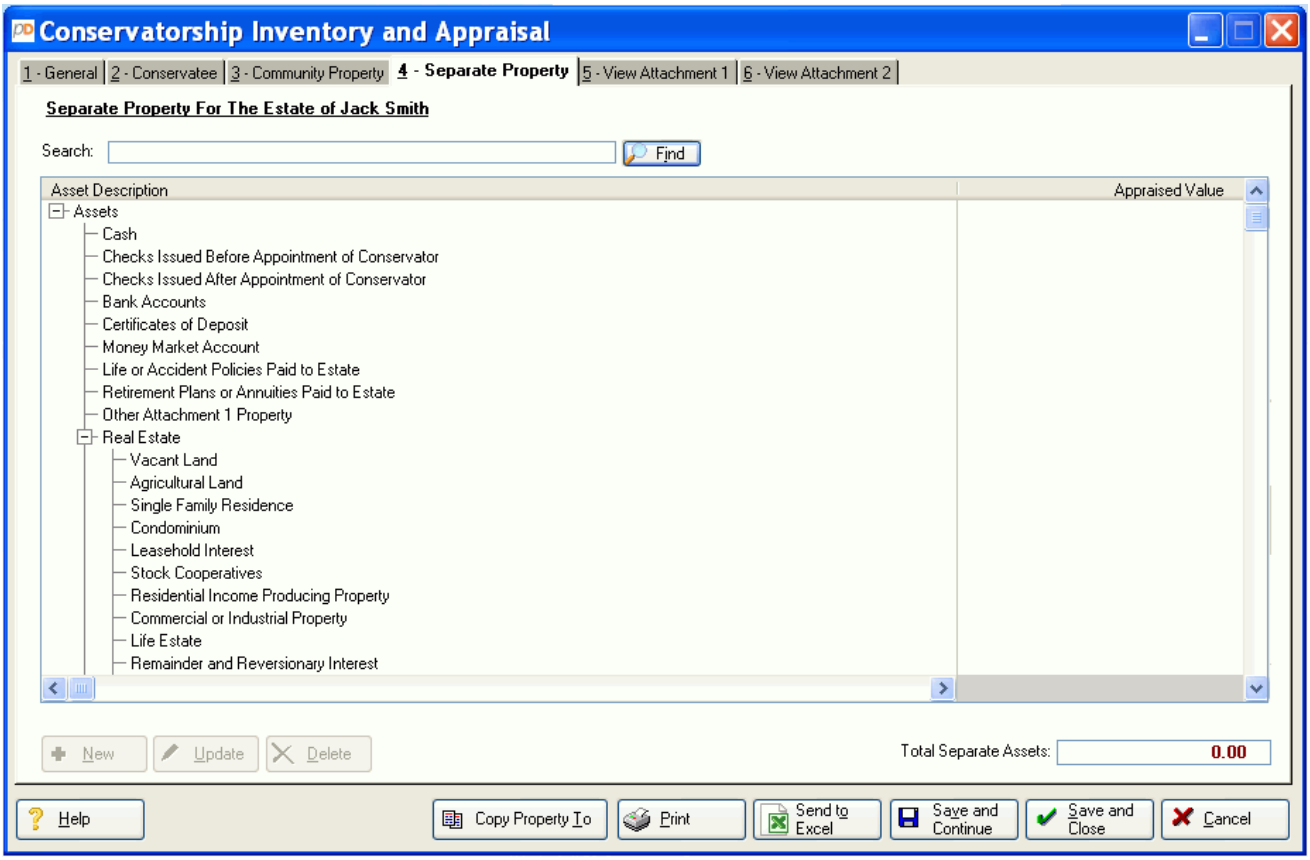


Figure 5, Separate Property Form

The **Separate Property** form allows you to enter details regarding the conservatee's separate property and the value of the property.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 215

Locating Asset Descriptions 215

Entering Assets 216

Using Toolbar Buttons 216

How Assets are Displayed

The information for each asset or property is displayed in columns: **Asset Description** and **Appraised Value**. As you enter assets, a running total is displayed under the listing, labeled **Total Separate Assets.**

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.

- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

This is a general overview of steps to enter assets. For specific help on various types of asset entries, click the **Help** button on each asset entry screen.

1. Double-click an asset description, right click a description and select **New Asset**, or click a description once and click the **New** button on the toolbar.
2. A window appears titled with the description you chose. It will display the entry fields appropriate for the asset.
3. Complete the displayed fields for the asset. These will vary according to the type of asset you are entering.
4. When you are finished, either click the **Add Another** button to enter another asset in the same category or click the **OK** button to return to the **Separate Property** form. The descriptions and amounts will be listed here.
5. You may edit an entry by double-clicking it, by right-clicking a description and selecting **Update Asset**, or by clicking it and clicking the **Update** button on the toolbar.
6. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking an asset entry and clicking **Delete Asset**.
7. You may copy an entry to other conservatees by right clicking an entry and selecting **Copy Asset**. A **Conservatee Selection** window appears and you can select the conservatee(s) to whom you wish to copy the asset. Also, you may copy entire lists of assets to another conservatee by selecting **Copy Property To** on the toolbar.

Using Toolbar Buttons to Work with Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

View Attachment 1 Form

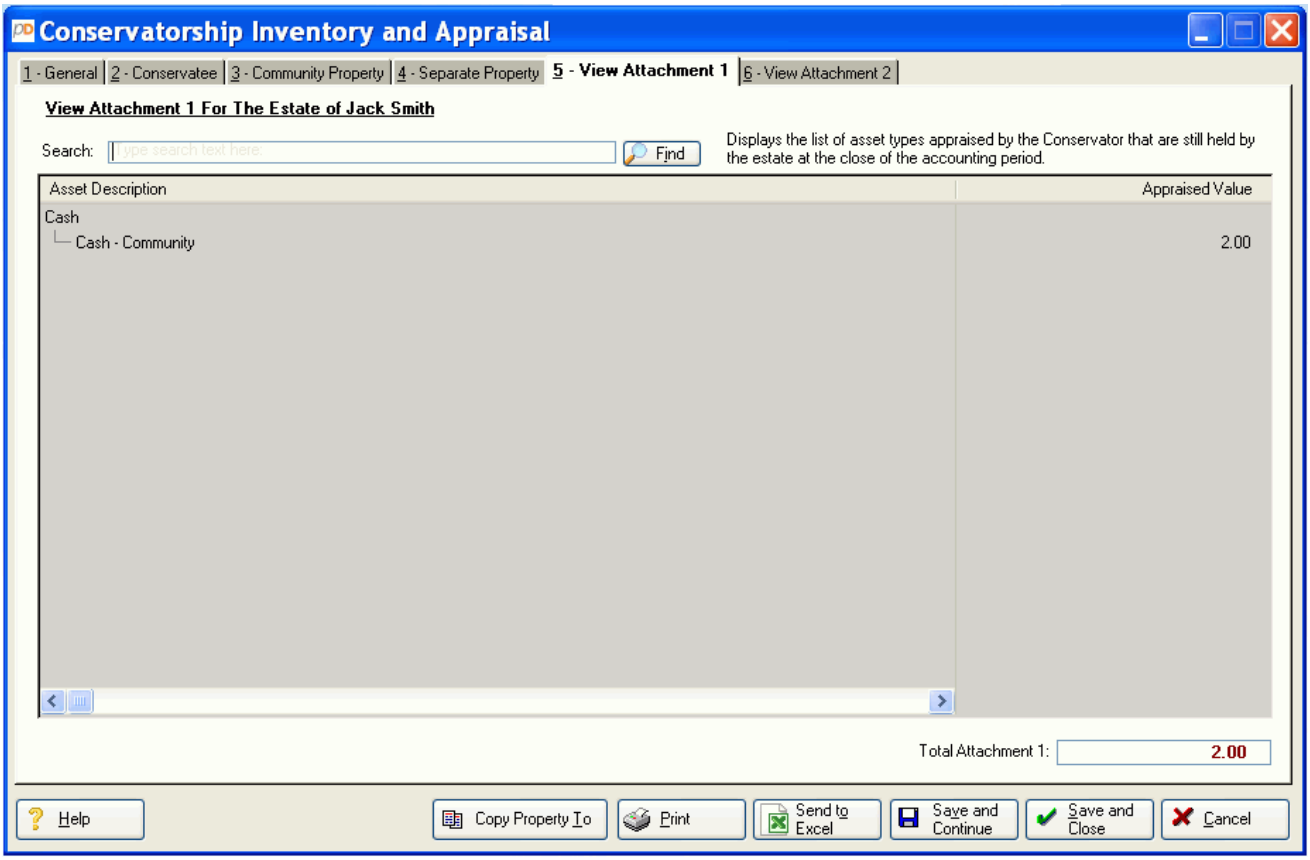


Figure 6, Attachment 1 Property Form

This form is completed automatically as you enter assets. It displays asset descriptions, appraised values and the total appraised value for the asset types appraised by the Conservator that are still held by the estate at the close of the accounting period. You cannot edit entries on this form.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list if it is longer than the viewable area.
- Click on the top asset entry in the **Asset Description** column and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

View Attachment 2 Form

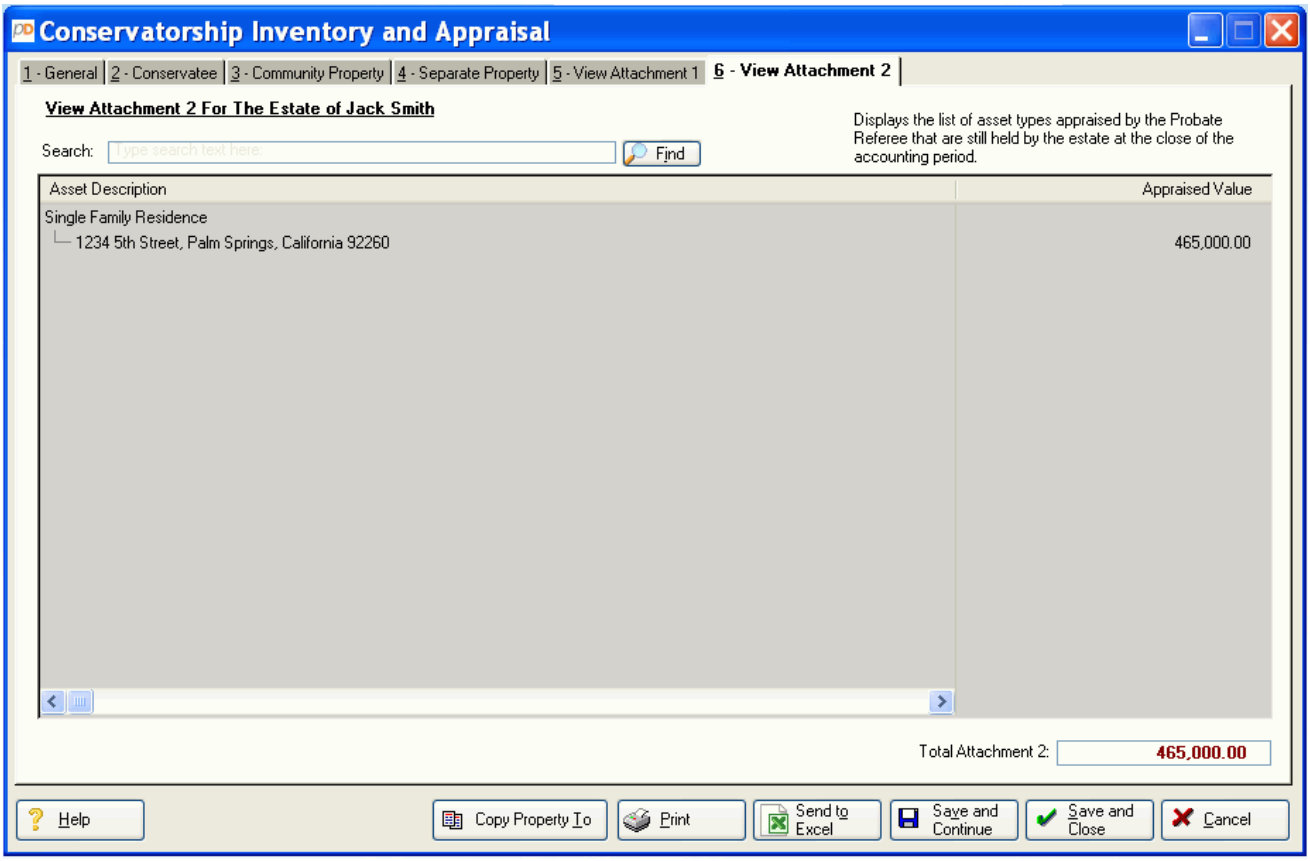


Figure 7, Attachment 2 Form

This form is completed automatically as you enter assets. It displays asset descriptions, appraised values and the total appraised value for the asset types appraised by the Probate Referee that are still held by the estate at the close of the accounting period. You cannot edit entries on this form.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list if it is longer than the viewable area.
- Click on the top asset entry in the **Asset Description** column and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Asset Description Categories

Attachment 1 Property Overview

Asset description categories which qualify as **Attachment 1 Property** are shown below. Since the entry fields vary considerably across these asset windows, please click the **Help** button on each asset window for detailed help with entering information for the asset.

Cash

Check Issued Before Appointment of Conservator

Check Issued After Appointment of Conservator

Bank Accounts

Certificates of Deposit

Money Market Account

Life or Accident Policies Paid to Estate in Lump Sum

Retirement Plans or Annuities Paid to Estate in Lump Sum

Other Attachment 1 Property

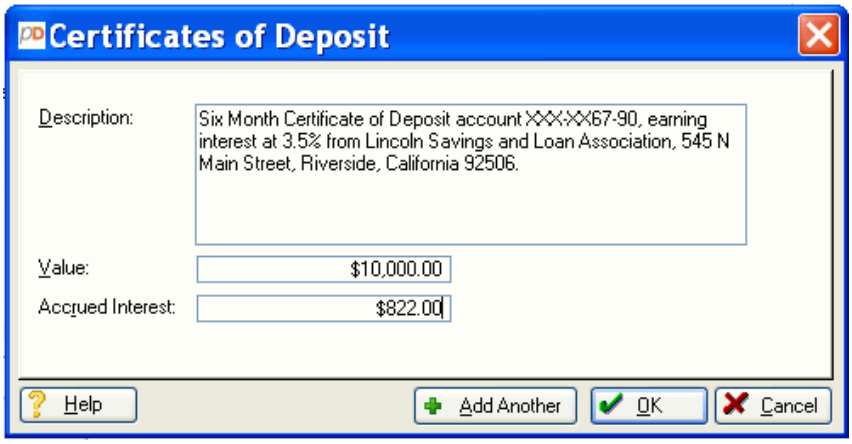


Figure 8, Certificate of Deposit

Button Descriptions and Functions

Help - Click this button to see help on completing specific asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Real Estate Overview

Asset description categories in the **Real Estate** listing are shown below. Click **Entering Asset Information** 220 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Vacant Land

Agricultural Land

Single Family Residence

Condominium

Leasehold Interest
Stock Cooperatives
Residential Income Producing Property
Commercial or Industrial Property
Life Estate
Remainder and Reversionary Interest
Time Share Interest
Other Real Estate

If a real estate asset doesn't fit into any other category, enter the asset in the **Other Real Estate** category.

Entering Asset Information. The asset description window opens with three fields for entering data: the **Property Address** field, the **Appraised Value** field, and the **Property Description** field. If you are entering assets on the **Community Property** form, it also contains a check box for selecting Quasi-Community Property.

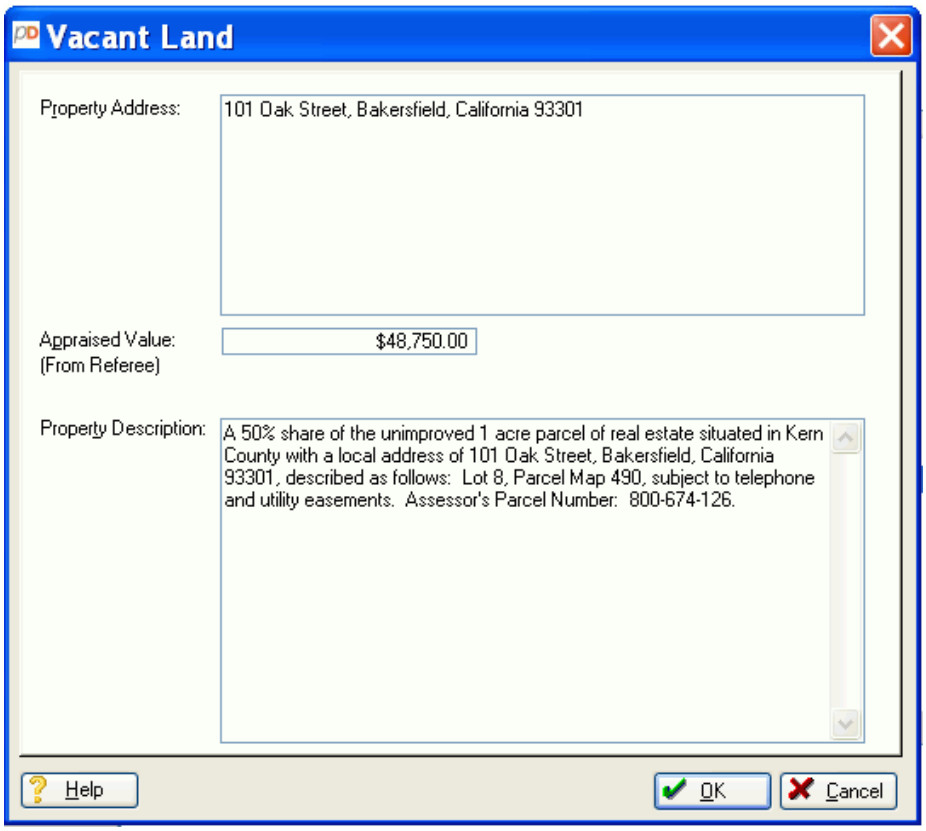

Vacant Land
Property Address:
101 Oak Street, Bakersfield, California 93301
Appraised Value:
(From Referee)
$48,750.00
Property Description:
A 50% share of the unimproved 1 acre parcel of real estate situated in Kern County with a local address of 101 Oak Street, Bakersfield, California 93301, described as follows: Lot 8, Parcel Map 490, subject to telephone and utility easements. Assessor's Parcel Number: 800-674-126.
Help
OK
Cancel

Figure 9, Example Vacant Land Entry

Click the **Help** button for detailed help with entering information for each asset.

Property Address - Enter the physical address of the property in line form (i.e., 101 Oak Street, Bakersfield, CA 94704).

Appraised Value (from referee) - Enter the referee-appraised value of the real estate or interest.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the real estate qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Property Description - Enter the complete legal description of the asset. Click the **Help** button to see a detailed description of the information required for the field.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Real Estate** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Business Interests Overview

Asset description categories in the **Business Interests** listing are shown below. Click **Entering Asset Information** 221 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Closely Held Corporation
Limited Partnerships
General Partnerships
Sole Proprietorships
Limited Liability Companies
Other Business

If a business asset doesn't fit into any other category, enter the asset in the **Other Business** category.

Entering Asset Information

The window used for business interests assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

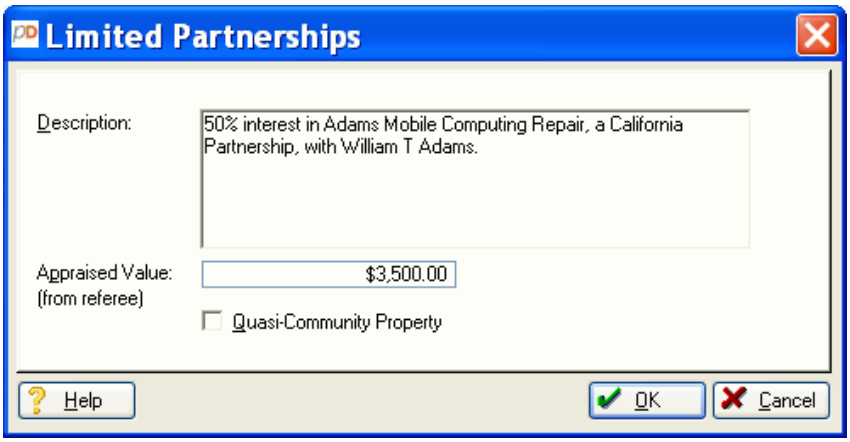


Figure 10, Limited Partnership Example

Description - Enter a description of the business interest. Click the **Help** button to see a detailed description of required entries for each business interest.

Appraised Value (from referee) - Enter the referee-appraised value of the business interest.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the business interest qualifies as Quasi-Community

Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Business Interests** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Tangible Personal Property Overview

Asset description categories in the **Tangible Personal Property** listing are shown below. Click **Entering Asset Information** 222 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Furniture, Furnishings and Miscellaneous
Jewelry
Coins or Stamps
Work of Art
Mobile Homes
Motor Vehicles
Boat, Airplane
Livestock and Breeding Animals
Other Personal Property

If a personal property asset doesn't fit into any other category, enter the asset in the **Other Personal Property** category.

Entering Asset Information

The window used for personal property assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

Figure 11, Example Tangible Personal Property Entries

Description - Enter a description of the property. Click the **Help** button to see a detailed

description of required entries for each type of property.

Appraised Value (from referee) - Enter the referee-appraised value of the personal property asset.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the personal property asset qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Tangible Personal Property** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Debt or Promissory Notes Owed to the Conservatee

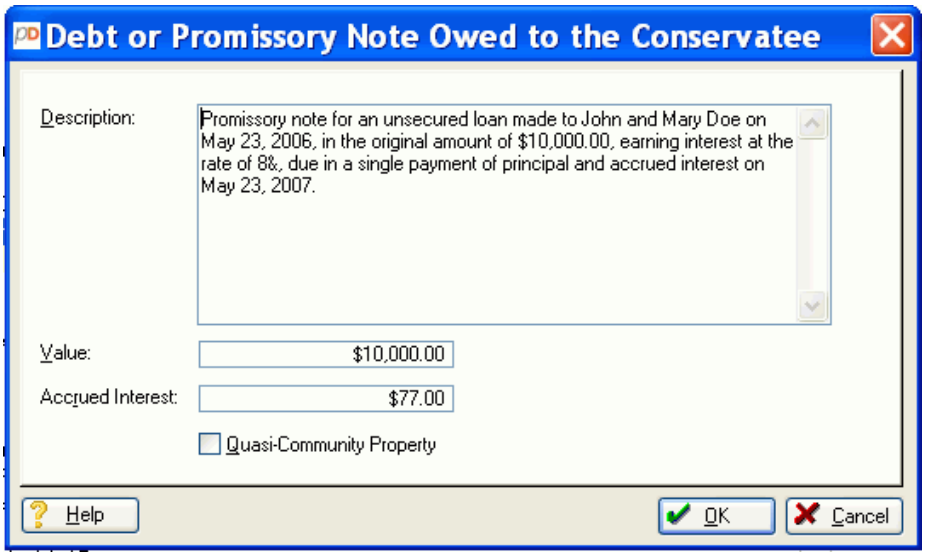

Debt or Promissory Note Owed to the Conservatee
Description:
Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original amount of $10,000.00, earning interest at the rate of 8%, due in a single payment of principal and accrued interest on May 23, 2007.
Value:
$10,000.00
Accrued Interest:
$77.00
Quasi-Community Property
Help
OK
Cancel

Figure 12, Debt or Promissory Note Owed to the Conservatee

To enter a debt or promissory note owed to the conservatee, or to update existing asset descriptions in this category, follow the steps below:

1. Enter a **Description** in the designated field. Include the terms of the note, such as the date of the debt or note and the final date due, the names of the borrowers, the original amount borrowed, the payment amount and dates of scheduled payments, the interest rate, and any security for the loan. If real property secures the loan, include either the Assessor's Parcel Number or the legal description of the property. Example: "Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original principal amount of $10,000.00, earning interest at the rate of 8%, due in a single payment of principal and accrued interest on May 23, 2007."
2. Enter the **Value** of the debt or note. The program will convert whole dollar entries to currency format for you.
3. Enter the amount of any **Accrued Interest** for the debt or note that had accrued as of the date of appointment of the Conservator but had not yet been credited.

4. If you are adding/updating an asset on the **Community Property** form, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset on the **Community Property** form after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Securities Overview

Asset description categories in the **Securities** listing are shown below. Click **Entering Asset Information** 224 or scroll down to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Brokerage Accounts
Brokerage Account Securities
Common and Preferred Stocks
Mutual Funds
Stock Options
Corporate, State and Municipal Bonds
United States Treasury Notes and Bonds
Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC) Security
United States Savings Bonds
Other Securities

If a **Securities** asset doesn't fit into any other category, enter the asset in the **Other Securities** category.

Entering Asset Information

The window used for **Securities** assets contains two fields. If you are entering assets on the **Community Property** form, it also contains a check box.

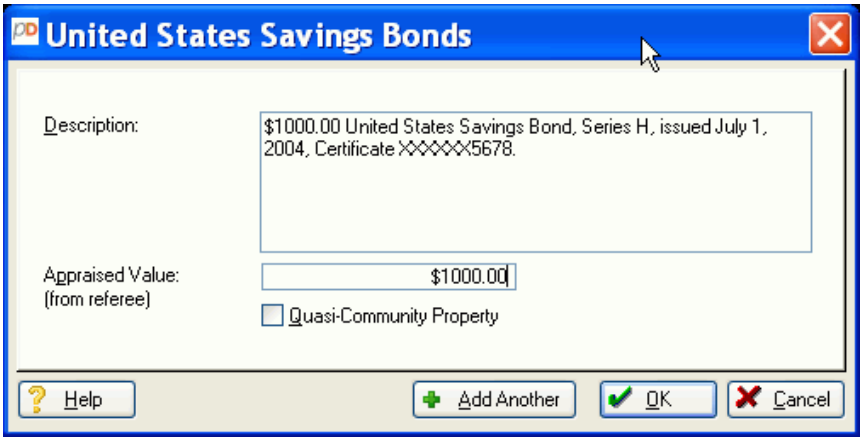


Figure 13, US Savings Bond

Description - Enter a description of the security. Click the **Help** button to see a detailed description of required entries for each type of security.

Appraised Value (from referee) - Enter the referee-appraised value of the security.

Quasi-Community Property - This check box is only displayed when you enter assets on the **Community Property** form. Click the box if the security qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Securities** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Other Intangible and Unscheduled Property

This window helps you enter assets which do not fit into any other listed category. To enter new assets or update existing asset descriptions in this category, follow the steps below:

1. Enter a **Description** of the asset in the designated field. Include a full description of intangible property not included in any of the previously described categories that was owned by the conservatee. Example: "Copyright and future royalty stream from 2001 book, 'The Life and Times of J.J. Schmidt', ISBN no. 1234567890, published by Narcissus Press."
2. Enter the **Appraised Value (from referee)** of the property. The program will convert whole dollar entries to currency format for you.
3. If you are adding/updating an asset on the **Community Property** form, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset on the **Community Property** form after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to

add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Selecting a Case

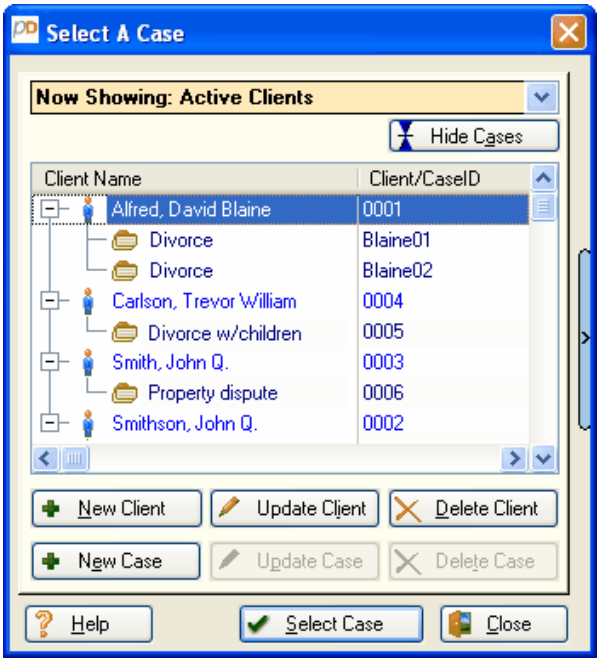


Figure 14, Selecting a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input. It lists existing ProDoc clients and all cases for the clients. You can use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click on a displayed case and then press the **Enter** key.
- Click on a displayed case and then click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients.** Other choices are **All Contacts and Cases, Closed Clients, Private Clients** and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

Select a Date Window

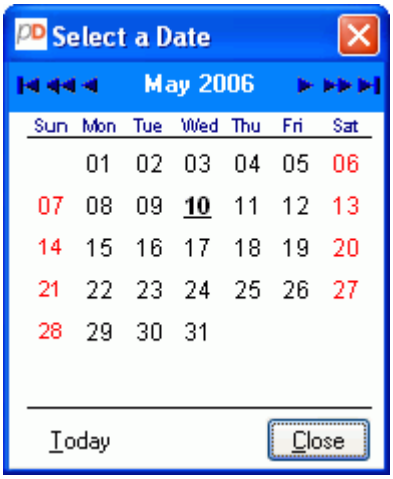


Figure 15, Select a Date Window

This window helps you quickly complete date fields. Tools and buttons on this calendar tool, depicted as Figure 15, include:

- and - Click to move back or forward one year.
- and - Click to move back or forward one month.
- and - Click to move back or forward one week.
- Use **Up** and **Down** arrow keys to move back and forward one week.
- Use **Left** and **Right** arrow keys to move back and forward one day.
- Click **Today** to move the underline/highlight to today's date.
- Click on the date to choose it or press the **Enter** key to choose the underlined date.
- Click **Cancel** to close the calendar without choosing a date.

Conservatorship Accounting

Getting Started

It's easy to produce an estate accounting for your conservatorship matters with the **Conservatorship Accounting** program. This program completely eliminates manual calculations, simplifies your work and dramatically reduces the time necessary to handle conservatorship matters. You need to only list the necessary information once. ProDoc automatically calculates the value of the estate and prints the required forms and attachments.

Starting the Program

1. Click **PowerPacks →Conservatorship → Accounting**.
2. The **Select a Case** 262 window opens. Select a case by double-clicking a visible case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button. Click the **Help** button on the window or click **here** 262 for detailed help for finding and selecting cases.
3. The **Conservatorship Accounting** program opens to the **General** tab.

Navigating the Conservatorship Accounting Program

There are nine tabs across the top of the main program window: **General** 230, **Begin Comm Property** 231, **Begin Sep Property** 235, **Charges** 237, **Credits** 240, **End Comm Property** 244, **End Sep Property** 246, **Changes in Asset** 248, and **Liabilities** 249. Each tab represents a different form. To move from one form to another, position the cursor over the tab you want to use and click on it.

The tabs labeled **Begin Comm Property** and **End Comm Property** are abbreviations for **Beginning Community Property** and **Ending Community Property**. In like manner, the tabs labeled **Begin Sep Property** and **End Sep Property** are abbreviations for **Beginning Separate Property** and **Ending Separate Property**.

You can also use hot keys. Wherever a window, screen or field title shows an underlined character, i.e., "**Case Number**", you can navigate to that entry by holding the "**Alt**" key and pressing the underlined keyboard character. In the earlier example, pressing **Alt + a** on your keyboard puts your cursor in the **Case Number** field.

Help With Using the Conservatorship Accounting Program

- Click the **Help** buttons on each window (or press the **F1** key).
- View or print the **ProDoc Software Manual.**
- View Computer Based Training (CBT) Modules at the **ProDoc Website.**
- Periodic ProDoc user seminars; schedule these at the **ProDoc Website.**
- Call our Customer Support specialists at 1-800-759-5418.
- Send email to **tech@prodoc.com.**

Main Toolbar

Figure 1, Main Toolbar

The toolbar along the bottom of each of the nine major forms consists of the **Help**, **Copy Property To**, **Print**, **Send to Excel**, **Save and Continue**, **Save and Close**, and **Cancel** buttons. This toolbar is always available while you are using the program. The buttons and their actions are discussed below.

Help - Click this button to display the help topic for the form or the current window.

Copy Property To - Click this button to copy all accounting information from the current conservatee to another conservatee with whom you wish to share the information. A box opens titled **Conservatee Selection**, displaying the names of all conservatees, and the message, **Select Conservatees For Whom You Want To Copy Accounting Information**. Accept the selection of all conservatees, or select only the names of conservatee(s) for whom you want to copy the accounting information. A box titled **Copy Complete** appears with the message **All accounting information has been successfully copied from [conservatee name] to the conservatee(s) you selected.**

Print - Click this button to print and/or preview form GC-400/GC-405 accounting forms. Here is the sequence of events after pressing the **Print** button:

1. A box opens titled **Conservatee Selection** appears with the message, **Select Conservatees For Whom You Want To Print The Accounting**. Accept the selection of all or select only the names of conservatee(s) for whom you want to print the accounting.
2. A box opens titled **Select Type of Accounting** with the caption, **Type of Accounting for [Conservatee Name]**. Select **Standard Account** or **Simplified Account** and click **OK**.

   If you selected **Simplified Account** a message box *may* appear titled **Confirm** with the message: **You have chosen to print a Simplified Accounting, but we have found that you may have met the Standard Accounting filing requirements. Are you sure that you want to print the Simplified Account?** Click **Yes** and the **Simplified Accounting** form prints. Click **No** and you are returned to the **Select Type of Accounting** decision box described in Step 2.

3. A box opens titled **Preview Standard Account** with the message, **Do you want to preview this form?** Click **Yes** to view the form, click **No** and the forms are sent to your default printer.
4. After the accounting forms are sent to the printer, a box appears titled **Report Progress,** with the message, **This is a complex form which will take some time to Complete. The actual time will depend on the speed of your computer and your free memory available.**

Send to Excel - Click this button to send all categories and amounts entered in the program to an Excel spreadsheet.

1. A box opens titled **Conservatee Selection**. Accept the selection of **All** or select only the names of conservatee(s) for whom you wish to export inventory data to Excel spreadsheets and click **OK**.
2. **A Save CSV File** window appears. Accept the name of the conservatee you selected (followed by a filename extension of **.csv**) as the filename to be saved or select any filename you wish, but keep the **.csv** filename extension. Click **Save** to save your CSV (comma separated values) file.
3. A Microsoft Excel window opens with the CSV spreadsheet displayed.

Save and Continue - Click this button to save the data that has been entered and continue working with the program.

Save and Close - Click this button to save the data that has been entered and exit the program.

Cancel - Click this button to exit the program without saving the information that you entered during the current session.

General Form

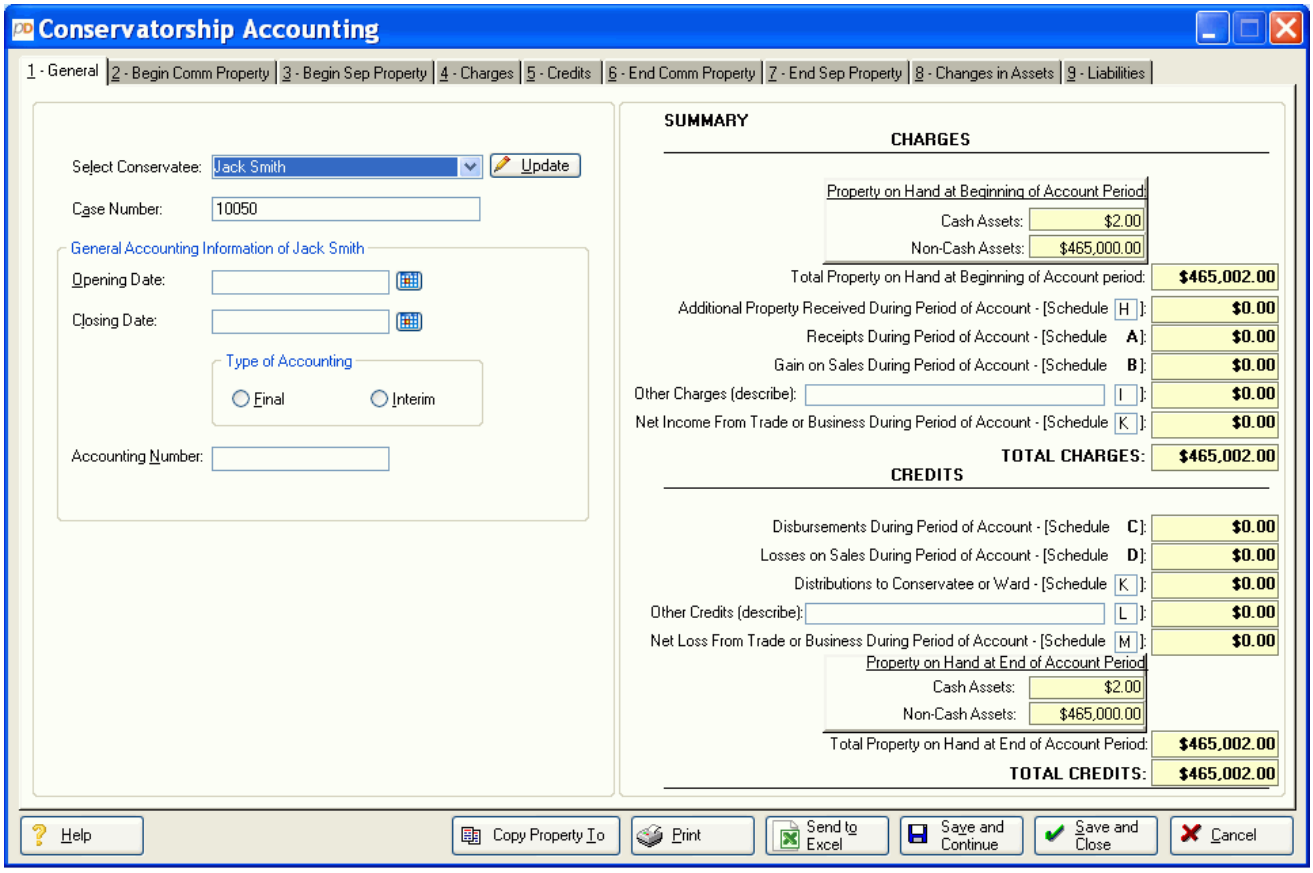

Conservatorship Accounting
1 - General
2 - Begin Comm Property
3 - Begin Sep Property
4 - Charges
5 - Credits
6 - End Comm Property
7 - End Sep Property
8 - Changes in Assets
9 - Liabilities
Select Conservatee:
Jack Smith
Update
Case Number:
10050
General Accounting Information of Jack Smith
Opening Date:
Closing Date:
Type of Accounting
Final
Interim
Accounting Number:
SUMMARY
CHARGES
Property on Hand at Beginning of Account Period
Cash Assets: $2.00
Non-Cash Assets: $465,000.00
Total Property on Hand at Beginning of Account period: $465,002.00
Additional Property Received During Period of Account - [Schedule H]: $0.00
Receipts During Period of Account - [Schedule A]: $0.00
Gain on Sales During Period of Account - [Schedule B]: $0.00
Other Charges (describe): [I]: $0.00
Net Income From Trade or Business During Period of Account - [Schedule K]: $0.00
TOTAL CHARGES: $465,002.00
CREDITS
Disbursements During Period of Account - [Schedule C]: $0.00
Losses on Sales During Period of Account - [Schedule D]: $0.00
Distributions to Conservatee or Ward - [Schedule K]: $0.00
Other Credits (describe): [L]: $0.00
Net Loss From Trade or Business During Period of Account - [Schedule M]: $0.00
Property on Hand at End of Account Period
Cash Assets: $2.00
Non-Cash Assets: $465,000.00
Total Property on Hand at End of Account Period: $465,002.00
TOTAL CREDITS: $465,002.00
Help
Copy Property To
Print
Send to Excel
Save and Continue
Save and Close
Cancel

Figure 2, General Form

This form collects name(s) of conservatee(s), case number, accounting period dates, type of accounting, and accounting number information. A separate **Summary Section** presents totals of assets on hand at the beginning of the inventory, totals of property received or disbursed during the inventory period, and lastly, the totals of assets on hand at the end of the accounting period. This section presents a summation of the information that you have entered on all of the forms. This section is completed automatically as you enter information into all of the remaining program forms. You cannot edit entries on this form.

To complete the **General Form**, perform the following steps:

1. **Select Conservatee** - Press the **Update** button. The **Conservatee Names** popup window opens and you are prompted to **Enter the names of all conservatees. You may create a separate accounting for each conservatee.** Use the **New**, **Update**, or **Delete** buttons to add, edit, or delete conservatee names. The **Add Conservatee**, **Update Conservatee Name and Alias**, or **Confirm Delete** window appears, where you can add, update or delete the names of conservatees and any aliases by which they are known.
2. **Case Number**: Enter the case number for this conservatee.
3. In the **General Accounting Information of [Conservatee Name]** section, enter the **Opening Date** and **Closing Date** of the accounting period. Click the calendar icon to easily **Select a Date** 263 from a pop-up calendar.
4. Enter the **Type of Accounting** you are performing (**Interim** or **Final**) by checking the appropriate button.
5. Enter the **Accounting Number**.

Beginning Community Property Form

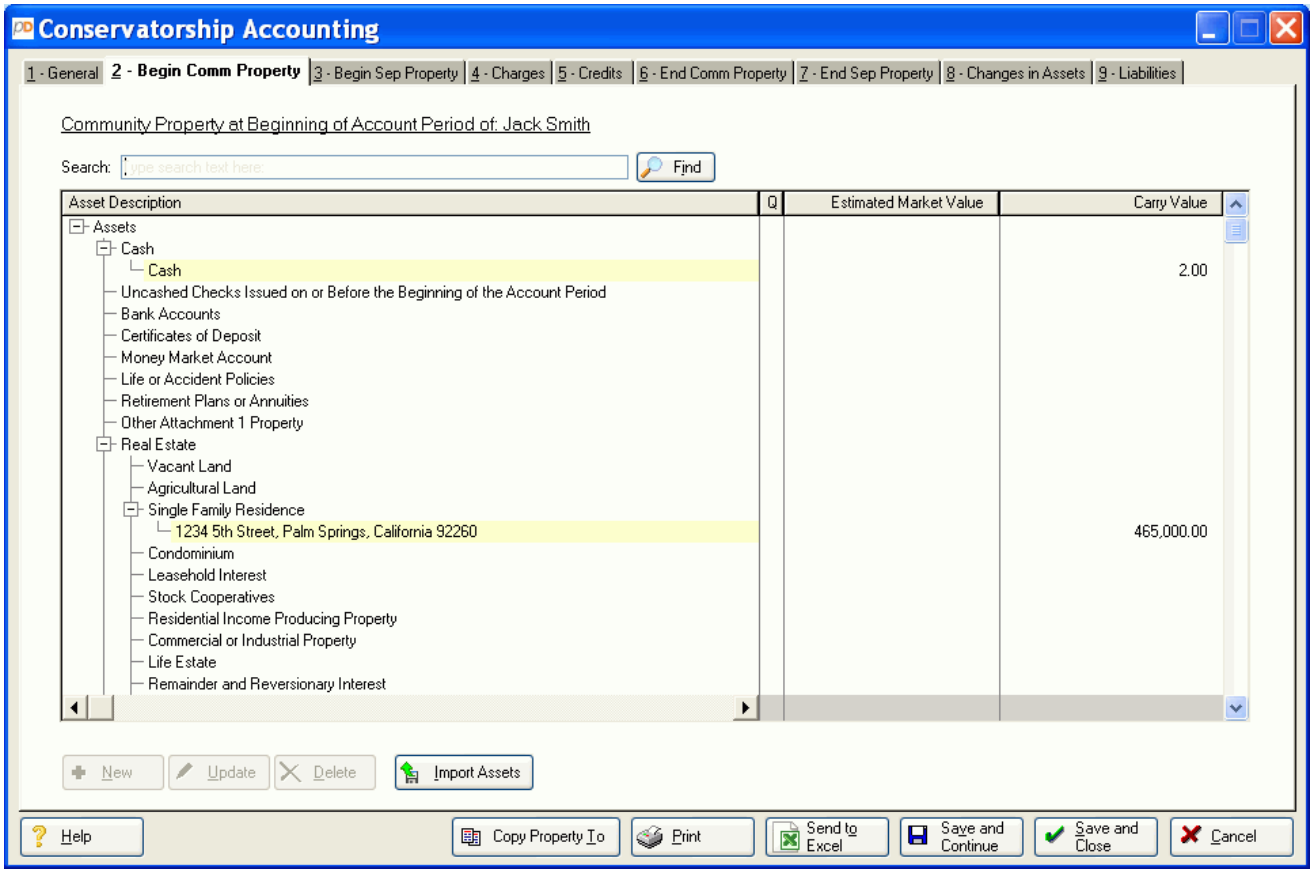


Figure 3, Beginning Community Property Form

The **Beginning Community Property Form** collects community property asset information as of the beginning date of the accounting period.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 231
Locating Asset Descriptions 231
Entering Assets 232
Importing Assets 233
Using Toolbar Buttons 235

How Assets are Displayed

The information for each asset or property is displayed in four columns: **Asset Description**, **Q** (Quasi-Community Property, identified by a green check mark), **Estimated Market Value**, and **Carry Value**.

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.

- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

This procedure applies to the following forms:

- **Beginning Community Property Form**
- **Beginning Separate Property Form**.
- **Ending Community Property Form**
- **Ending Separate Property Form**

This is a general overview of the steps to enter assets. For specific help on various types of asset entries, click the **Help** button on each asset entry screen.

1. Double-click an asset description, right click a description and select **New Asset**, or click a description once and click the **New** button on the toolbar.
2. A window appears titled with the description you chose. It will display the entry fields appropriate for the asset. When the cursor is placed in a field, a message appears with explanatory information regarding the information that should be entered.

   Expect to see different fields for the various types of assets. For example, real estate topics will have **Property Address**, **Property Description**, and **Carry Value** fields; whereas cash type assets will have fields for account **Balance** and **Accrued Interest**.
3. Complete the displayed fields for the asset. These will vary according to the type of asset you are entering.
4. In the **Description** field, enter a complete description of the asset.
5. In the **Comment** field, enter any relevant information which might aid in identifying the asset.
6. In the **Name of Inventory** field, list the type of inventory. For example: Initial, Partial, Final, Amended, Supplemental, Reappraisal for Sale, or Property Tax Certificate.
7. In the **Date of Inventory** field, list the date the inventory was signed in mm/dd/yyyy format or click the calendar icon to use **Select a Date** calendar tool.
8. Enter the **Estimated Market Value** of the asset. The program will convert whole dollar entries to currency format for you.
9. Enter the **Carry Value** of the asset. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the conservator is its purchase price.)
10. In the **Amount** section (if shown), enter the amount of the asset. The program will convert whole dollar entries to currency format for you.
11. (This Step applies to the **Beginning Community Property Form** and the **Ending Community Property Form** only.)
    Check the box if the asset is Quasi-Community Property. When you are finished, either click the **Add Another** button to enter another asset in the same category or click the **OK** button to return

to the form in which you were entering assets. The descriptions and amounts will be listed here.

12. (This Step applies to the **Ending Community Property Form** and the **Ending Separate Property Form** only)
    Check the box that represents the **Property Status** of the asset: **Still on Hand**, **Disposed of**, or **Acquired**.
13. You may edit an entry by double-clicking it, or by clicking it and clicking the **Update** button on the toolbar, or by right clicking an asset entry and selecting **Update Asset**.
14. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking an asset entry and clicking **Delete Asset**.
15. You may copy an asset entry to other conservatees by right clicking an entry and selecting **Copy Asset**. A **Conservatee Selection** window appears and you can **Select Conservatee(s) For Whom You Want to Copy Accounting Information**. After selecting all or selected names, click **OK** and a **Copy Complete** box appears with the message, **The selected item has been successfully copied from [Conservatee name] to the conservatee(s) you selected**. Click **OK** and you are returned to the form in which you were entering assets. Also, you may copy entire lists of assets to another conservatee by selecting **Copy Property To** on the toolbar.

Importing Assets

The **Import Assets** button on this form's toolbar allows you to select and import items from the last Conservatorship Inventory and Appraisal for this conservatee. This procedure applies to the **Beginning Community Property Form** and the **Beginning Separate Property Form**.

This is a general overview of the steps to import assets. For specific help on importing various types of asset entries, click the **Help** button on each import asset screen.

1. You may import an asset from this conservatee's last inventory report by clicking the **Import Assets** button. An **Import Inventory** message appears: **This import will overwrite any assets with same description from the same inventory. Do you want to continue?** Select **OK** and the **Import Assets From Inventory** window appears.

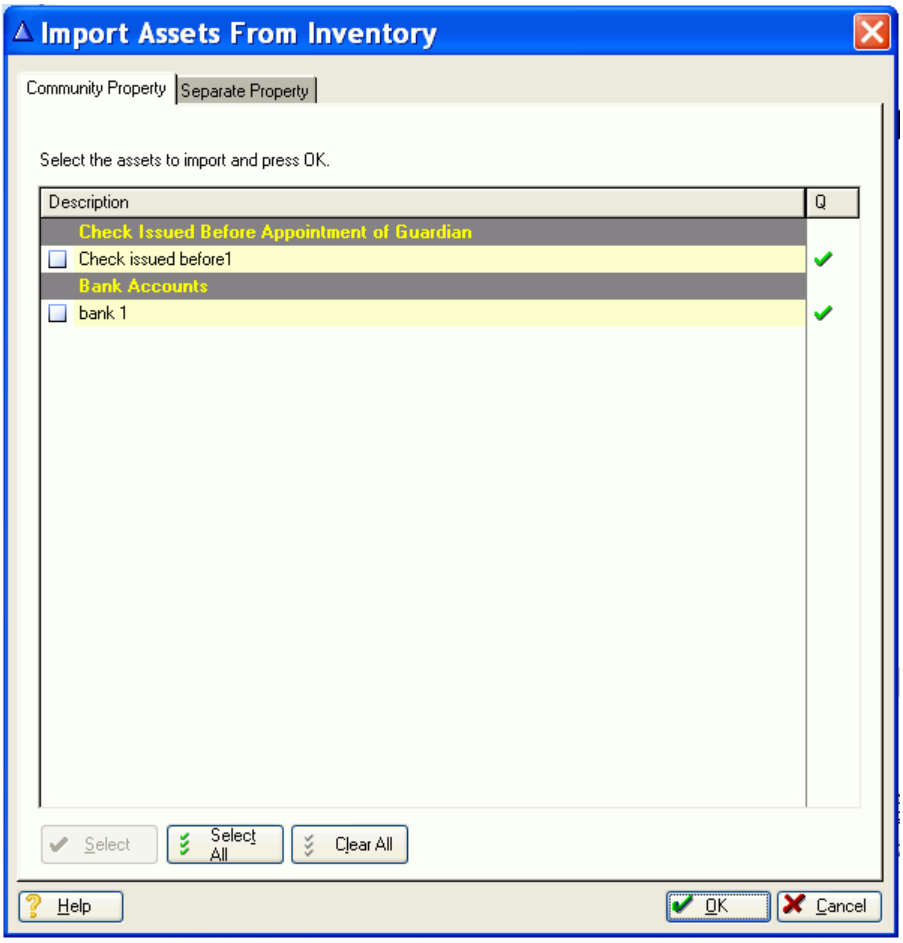


Figure 4, Importing Assets From Inventory Window

2. In the **Import Assets From Inventory** window:
   a. Select assets from the inventory's **Community Property** pages or **Separate Property** pages.
   b. Click check boxes to select assets to import.
   c. Click **OK**. The **Inventory Information** window appears.

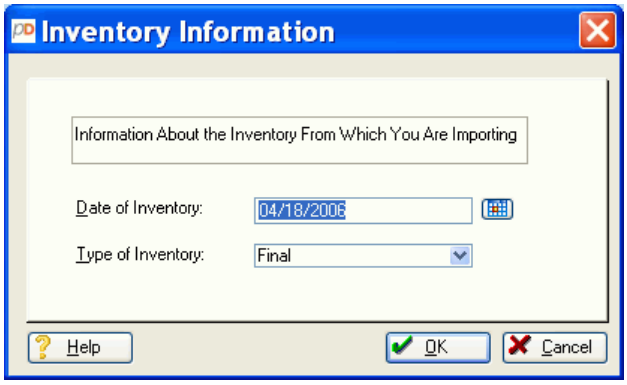


Figure 5, Inventory Information Window

3. In the **Inventory Information** window this message is displayed: **Information About the Inventory From Which You Are Importing: Date of Inventory:** [mm/dd/yyyy], **Type of Inventory:** [Initial, Partial, Final, Amended, Supplemental, Reappraisal for Sale, Property Tax Certificate].

a. Click **OK**.
b. You are returned to the **Beginning Community Property Form** or the **Beginning Separate Property Form**.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to an asset entry.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Import Assets - Select and import assets from this conservatee's last inventory report.

Beginning Separate Property Form

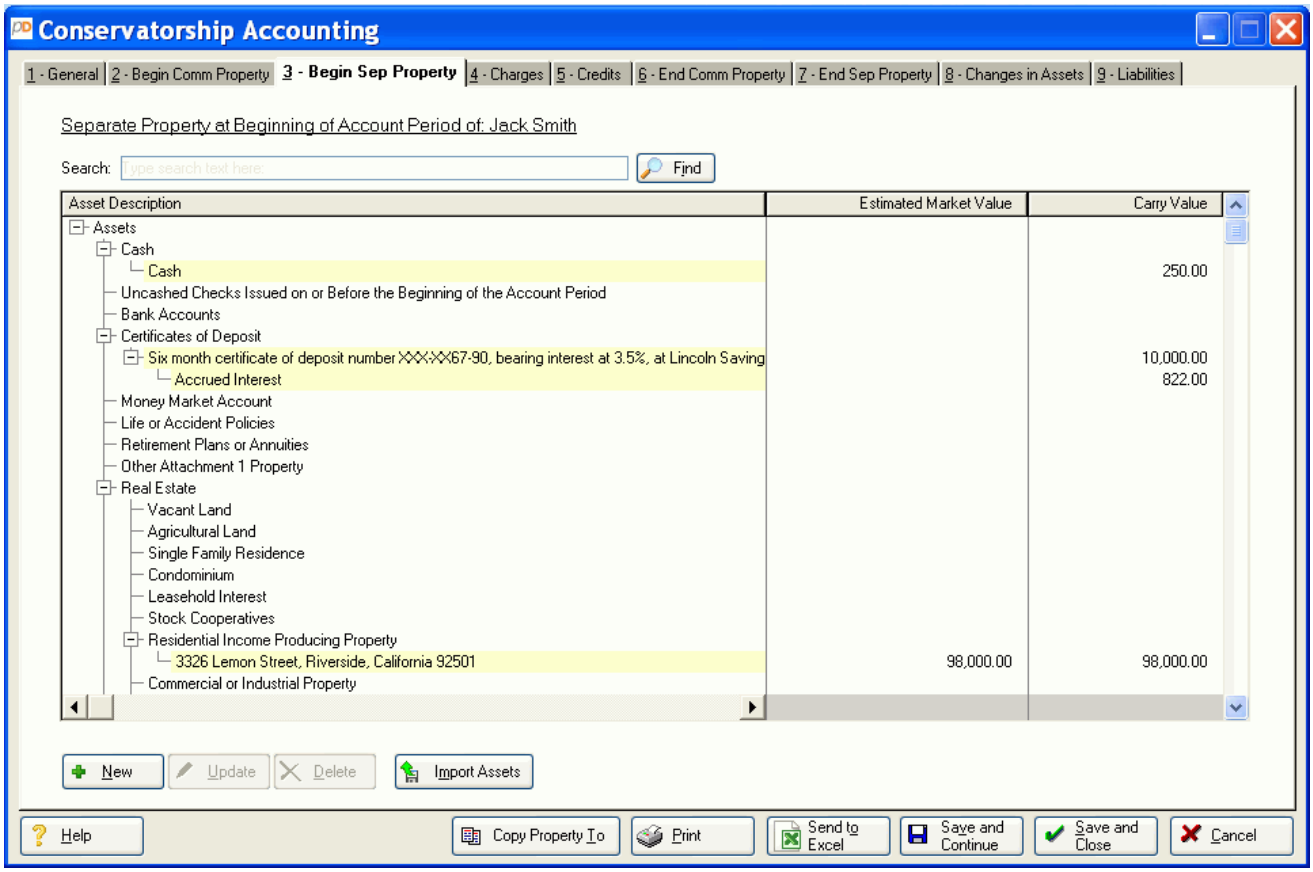


Figure 6, Beginning Separate Property Form

The **Beginning Separate Property Form** collects separate property asset information as of the beginning date of the accounting period.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 236
Locating Asset Descriptions 236
Entering Assets 236

Importing Assets 236
Using Toolbar Buttons 236

How Assets are Displayed

The information for each asset or property is displayed in three columns: **Asset Description**, **Estimated Market Value**, and **Carry Value**.

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

See the **Entering Assets** 232 procedure in the **Beginning Community Property Form** for a general overview of the steps to enter assets.

Importing Assets

See the **Importing Assets** procedure in the **Beginning Community Property Form** for a general overview of the steps to import assets.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value, and any other necessary information to an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Import Assets - Select and import assets from this conservatee's last inventory report.

Charges Form

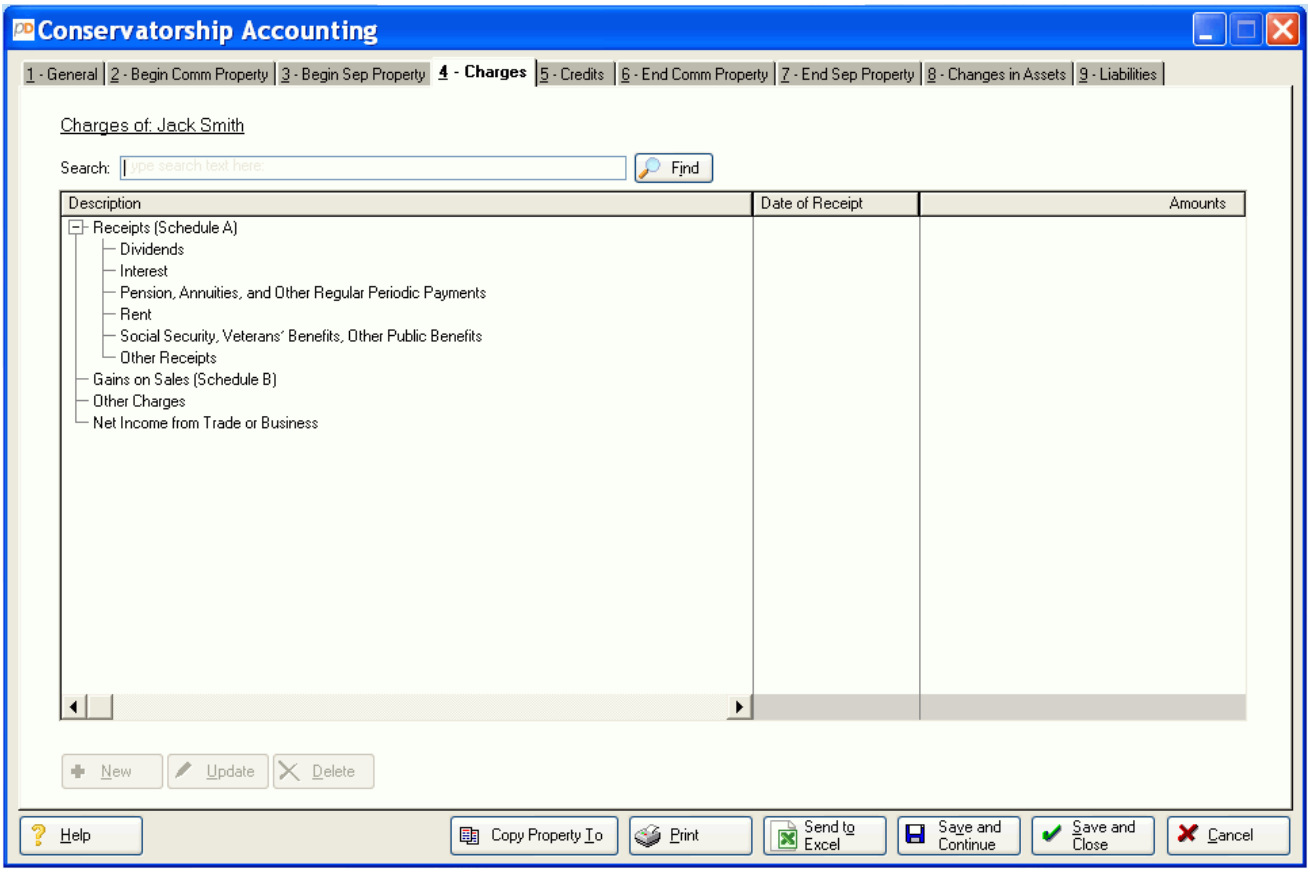


Figure 7, Charges Form

The **Charges Form** collects information on all charges received during the accounting period that are not shown on the beginning inventory. Charges are payments received from all sources, including income from trade or business, dividends, interest, pensions, rent, Social Security or other benefits, and gains on sales.

If the entries involve gains on sales of assets or other adjustments to the carrying values of assets, they should be entered on Schedule B (at the bottom of this form).

Scroll down or click the links to jump to the help section in this topic you want to see:

How Charges are Displayed 237
Locating Charge Descriptions 238
Entering Charges 238
Using Toolbar Buttons 239

How Charges are Displayed

The information for each charge is displayed in three columns: **Description**, **Date of Receipt**, and **Amounts**.

Entries of actual charges are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Charge Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Receipts,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching charge item will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Description** list.

Entering Charges

This is a general overview of the steps to enter charges. For specific help on various types of charge entries, click the **Help** button on each charge entry screen.

To enter data on the **Charges Form**, perform the following steps:

1. Double-click a charge description, right click a description and select **New Charge Item**, or click a description once and click the **New** button on the toolbar.
2. A window appears, titled with the description you chose. It will display the entry fields appropriate for the charge item. When the cursor is placed in a field, a message appears with explanatory information regarding the information that should be entered.
3. Complete the displayed fields for the charge item. These will vary according to the type of charge you are entering.
4. In the **Description** field, enter a complete description of the charge item.
5. In the **Comment** section, enter any relevant information which might aid in identifying the charge item.
6. Enter the **Date of Receipt** for each entry in mm/dd/yyyy format or click the calendar icon to use a **Select a Date** that makes it easy to add a date.
7. In the **Amount** section, enter the amount of the received payment. The program will convert whole dollar entries to currency format for you.
8. For **Gains on Sales (Schedule B)** assets, use the **Sale Price**, **Carry Value**, and **Gain** fields to compute the net value received on the sale.
9. For **Net Income From Trade or Business**, use the fields for the **Name of Business** and, in another **Business Transactions** window, use the fields for **Description** of the transaction, **Comment**, **Date of Transaction**, and **Amount**.
10. When you are finished, either click the **Add Another** button to enter another charge item in the same category or click the **OK** button to return to the **Charges Form**. The descriptions and amounts will be listed here.
11. You may edit an entry by double-clicking it, or right-clicking an asset entry and clicking **Update Charges**, or by clicking it and clicking the **Update** button on the toolbar.
12. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking a charge entry and clicking **Delete Charges**.

13. You may copy a charge item entry to other conservatees by right clicking an entry and selecting **Copy Charge**. A **Conservatee Selection** window appears and you can **Select Conservatee(s) For Whom You Want to Copy Accounting Information**. After selecting all or selected names, click **OK** and a **Copy Complete** box appears with the message, **The selected item has been successfully copied from [Conservatee name] to the conservatee(s) you selected**. Click **OK** and you are returned to the **Charges Form**. Also, you may copy entire lists of charges, credits, and assets to another conservatee by selecting **Copy Property To** on the toolbar.

Using Toolbar Buttons

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to a charge item.

Update - Modify a highlighted charge item.

Delete - Remove a highlighted charge item.

Charges Overview

Asset description categories which qualify as charge items are shown below. Since the entry fields vary considerably across these asset windows, please click the **Help** button on each asset window for detailed help with entering information for the charge item.

Dividends

Interest

Pensions, Annuities, and Other Regular Periodic Payments

Rental Income

Social Security, Veterans, Other Public Benefits

Other Receipts

Gains on Sales

Other Charges

Net Income From Trade or Business

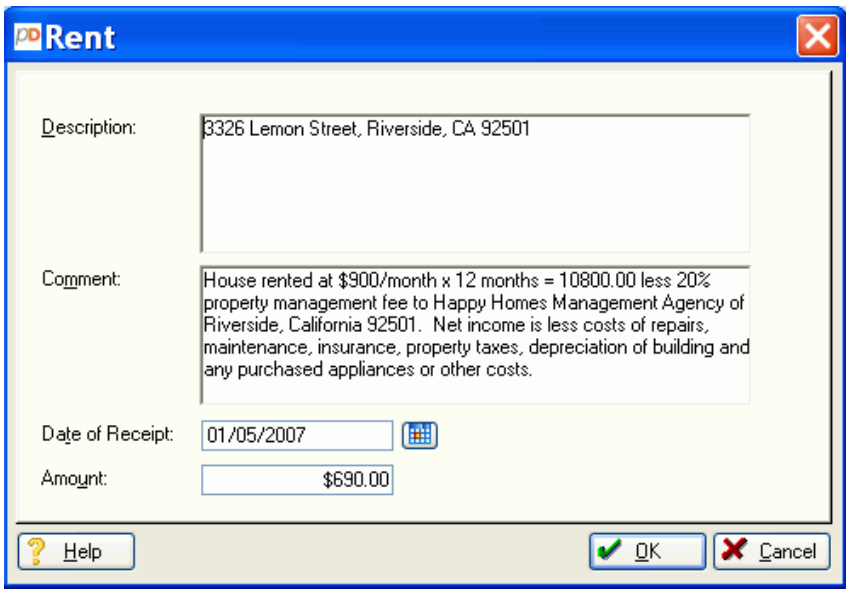

Rent
Description:
3326 Lemon Street, Riverside, CA 92501
Comment:
House rented at $900/month x 12 months = 10800.00 less 20% property management fee to Happy Homes Management Agency of Riverside, California 92501. Net income is less costs of repairs, maintenance, insurance, property taxes, depreciation of building and any purchased appliances or other costs.
Date of Receipt:
01/05/2007
Amount:
$690.00
Help
OK
Cancel

Figure 8, Rental Income

To enter new charge receipts or update existing receipt descriptions in this category, perform the following steps:

1. In the **Description** field, enter a description of the charge item. Click the **Help** button to see a detailed description of required entries for each type of receipt.
2. In the **Comment** section add any information you feel would help in understanding the information in any of the fields.
3. Enter the **Date of Receipt** of the payment in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** calendar tool.
4. Enter the **Amount** of this receipt. The program will convert whole dollar entries to currency format for you.

Button Descriptions and Functions

Help - Click this button to see help on completing this window.

Add Another - This button will only appear when you are adding a new charge item. Click this button to add another charge of the same type.

OK - When you are finished adding receipts of this type, click this button to add the information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Credits Form

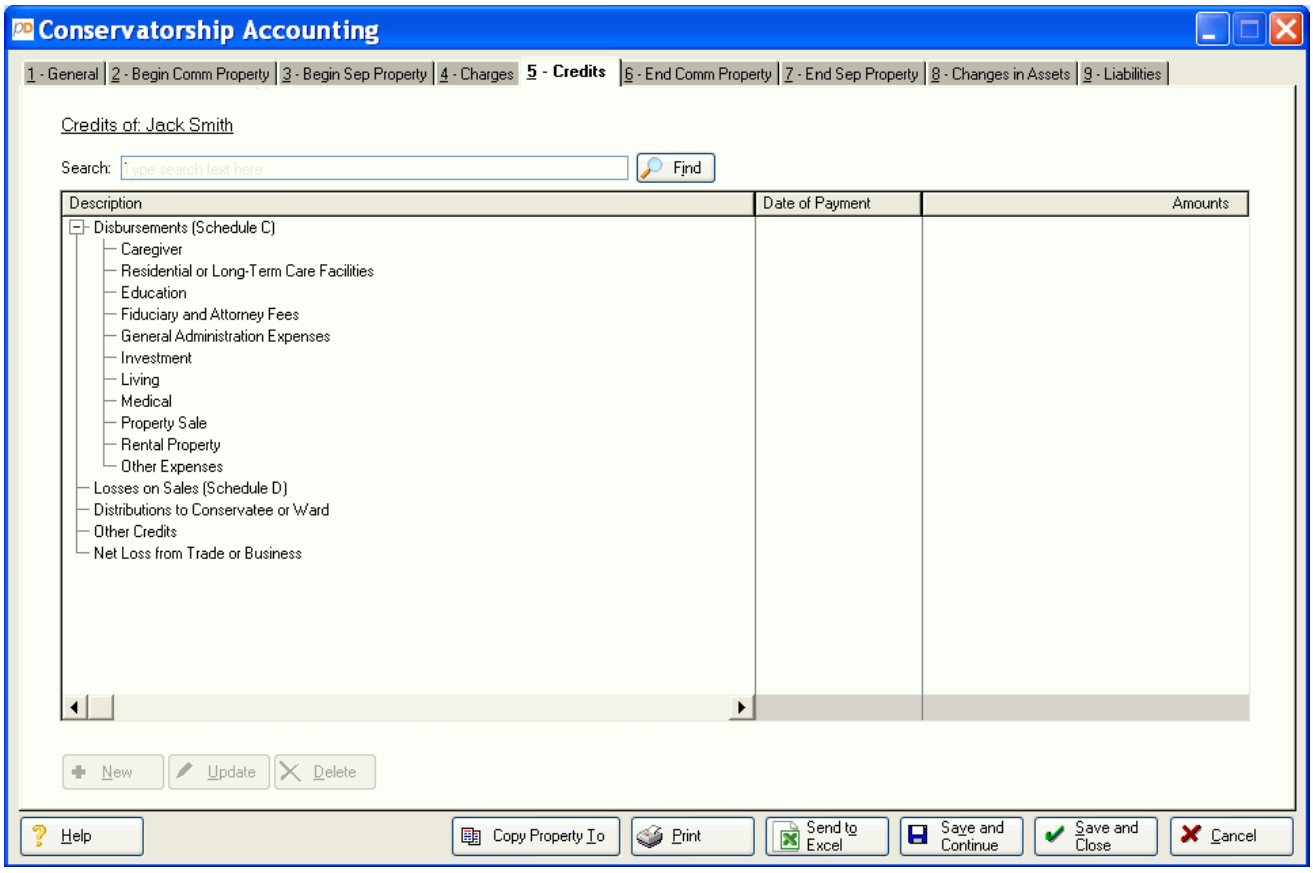


Figure 9, Credits Form

The **Credits Form** collects information on all disbursements, distributions, losses on sales, other credits, or net loss from trade or business occurring during the accounting period that are not shown on the beginning inventory.

If the entries involve losses on the sale of assets or adjustments to the carrying values of assets, they should be entered on Schedule D (at the bottom of this form).

Scroll down or click the links to jump to the help section in this topic you want to see:

How Credits are Displayed 241
Locating Credit Descriptions 241
Entering Credits 241
Using Toolbar Buttons 242

How Credits are Displayed

The information for each disbursement, distribution, or loss is displayed in three columns: **Description**, **Date of Payment**, and **Amounts**

Entries of actual disbursement, distribution, or loss are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Credit Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Disbursements,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Description** list.

Entering Credits

This is a general overview of the steps to enter assets. For specific help on various types of credit entries, click the **Help** button on each credit entry screen.

1. Double-click a credit description, right click a description and select **New Credit**, or click a description once and click the **New** button on the toolbar.
2. A window will appear titled with the description you chose. It will display the entry fields appropriate for the asset. When the cursor is placed in a field, a message appears with explanatory information regarding the information that should be entered.
3. Complete the displayed fields for the credit. These will vary according to the type of credit you are entering.
4. In the **Comment** section, enter any relevant information which might aid in identifying the credit.

5. Enter the **Date of Payment** in mm/dd/yyyy format or use the calendar icon to use the **Select a Date** 263 calendar tool.
6. Enter the **Amount** of the payment. The program will convert whole dollar entries to currency format for you.
7. For **Losses on Sales (Schedule D)** assets, use the **Carry Value**, **Sale Price**, and **Amount of Loss** fields to compute the amount of loss on the sale.
8. For payments for **Fiduciary and Attorney Fees** and **Distributions to Conservatee**, provide the **Date of Order** authorizing each distribution.
9. When you are finished, either click the **Add Another** button to enter another credit in the same category or click the **OK** button to return to the **Credits Form**. The descriptions and amounts will be listed here.
10. You may edit an entry by double-clicking it, right click a description and select **Update Credit**, or by clicking it and clicking the **Update** button on the toolbar.
11. You may delete an entry by highlighting it and clicking the **Delete** button on the toolbar, or right-clicking an asset entry and clicking **Delete Credit**.
12. You may copy a credit entry to other conservatees by right clicking an entry and selecting **Copy Credit**. A **Conservatee Selection** window appears and you can **Select Conservatee(s) For Whom You Want to Copy Accounting Information**. After selecting all or selected names, click **OK** and a **Copy Complete** box appears with the message, **The selected credit item has been successfully copied from [Conservatee name] to the conservatee(s) you selected**. Click **OK** and you are returned to the **Credits Form**. Also, you may copy entire lists of credits and assets to another conservatee by selecting **Copy Property To** on the toolbar.

Using Toolbar Buttons to Work With Credits

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to an asset entry.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Credits Overview

Asset description categories which qualify as **Credits Form** disbursements, distributions, or losses are shown below. Since the entry fields vary considerably across these credit windows, please click the **Help** button on each credit window for detailed help with entering information for the disbursement.

Caregiver

Residential or Long-Term Care Facilities

Education

Fiduciary and Attorney Fees

General Administration

Investments

Living Expenses

Medical Expenses

Sale of Property

Rental Property Expenses

Other Expenses
Losses on Sales
Distributions to Conservatee
Other Credits
Net Loss From Trade or Business

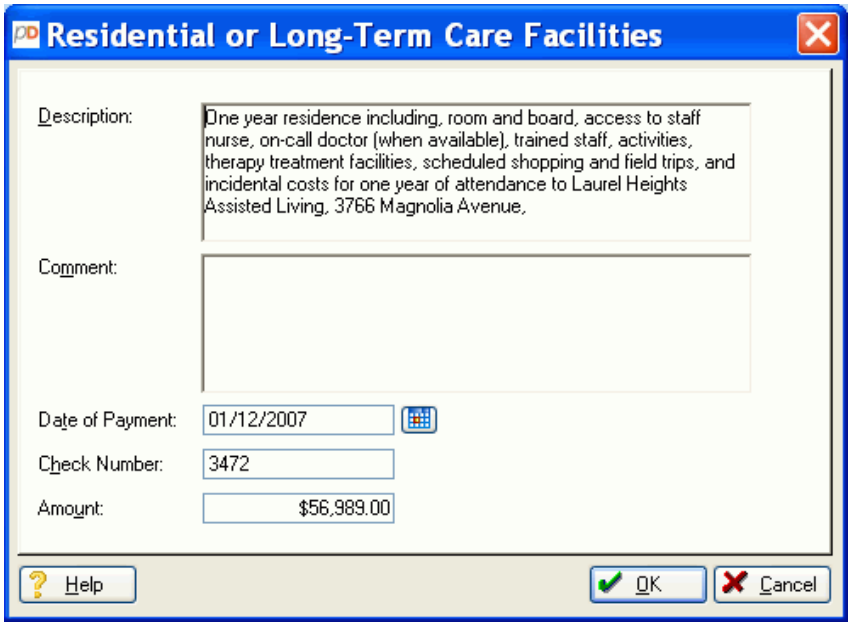

Residential or Long-Term Care Facilities
Description:
One year residence including, room and board, access to staff nurse, on-call doctor (when available), trained staff, activities, therapy treatment facilities, scheduled shopping and field trips, and incidental costs for one year of attendance to Laurel Heights Assisted Living, 3766 Magnolia Avenue,
Comment:
Date of Payment:
01/12/2007
Check Number:
3472
Amount:
$56,989.00
Help
OK
Cancel

Figure 10, Residential or Long-Term Care Facilities Expenses

To enter new disbursements or update existing descriptions in this category, perform the following steps:

1. In the **Description** field, enter a description of the disbursement. Click the **Help** button to see a detailed description of required entries for each type of disbursement.
2. In the **Comment** section add any information you feel would help in understanding the information in any of the fields.
3. Enter the **Date of Payment** of the disbursement in mm/dd/yyyy format or click the calendar icon to use the **Select a Date** 263 calendar tool.
4. Enter the **Check Number**.
5. Enter the **Amount** of this disbursement. The program will convert whole dollar entries to currency format for you.

Button Descriptions and Functions

Help - Click this button to see help on completing this window.

Add Another - This button will only appear when you are adding a new disbursement. Click this button to add another disbursement of the same type.

OK - When you are finished adding disbursement of this type, click this button to add the disbursement information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Ending Community Property Form

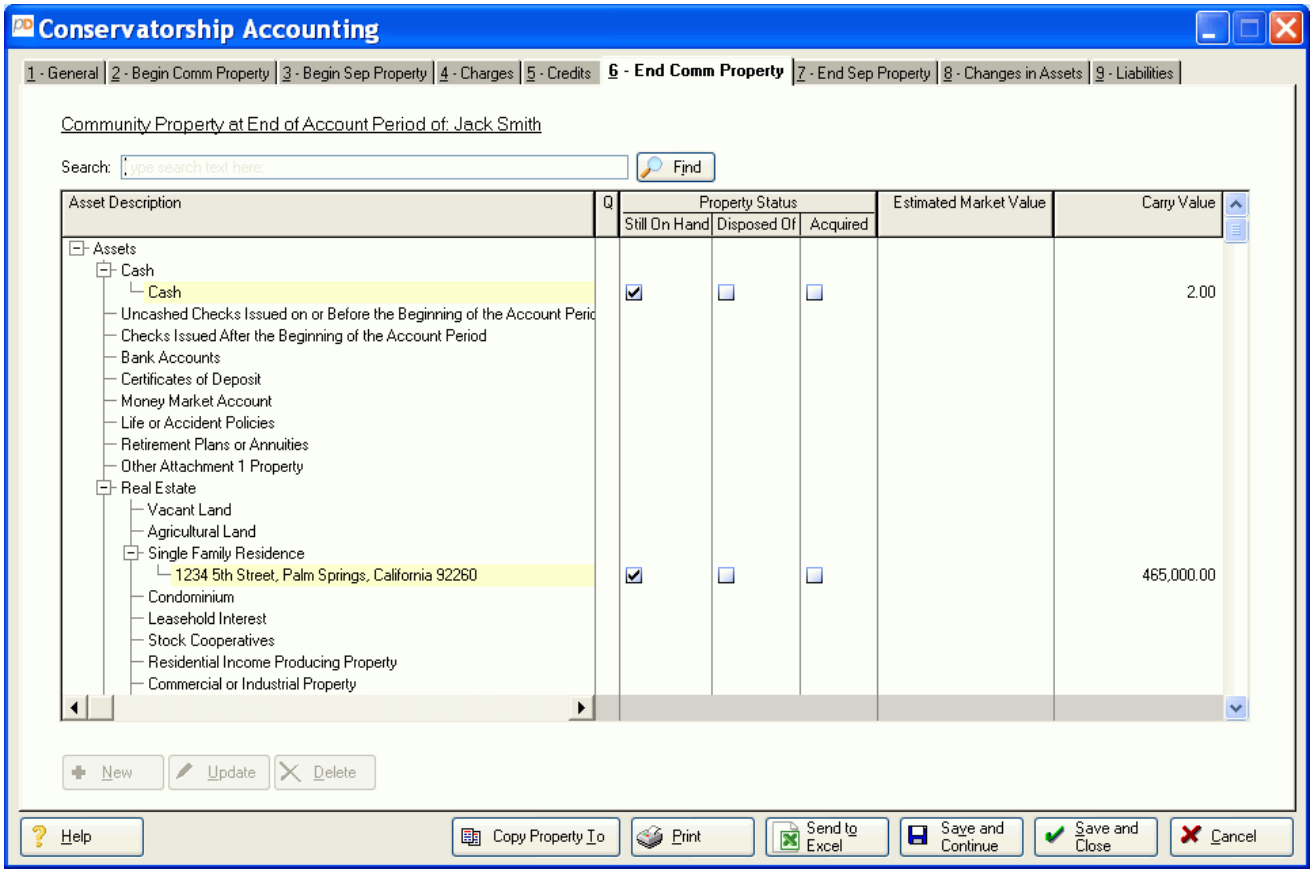


Figure 11, Ending Community Property Form

The **Ending Community Property Form** collects community property asset information as of the ending date of the accounting period. All assets appearing in the **Beginning Community Property Form** automatically appear in the **Ending Community Property Form**. If the status or condition of the asset has changed; its value appreciated or depreciated; the asset has been sold or otherwise disposed of; such asset information should be edited or updated to reflect its value as of the ending date of the accounting period.

Schedule E (Attachment 1) cash-type assets are assets that may be appraised by the conservator and listed on Attachment 1 of the inventory. All other non-cash assets must be appraised by a probate referee and listed on Attachment 2 of the inventory and appraisal. List all non-cash assets, group them by the inventory in which their latest appraised values appear, or if none, as after-acquired assets in order of their purchase dates.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 244

Locating Asset Descriptions 245

Entering Assets 245

Using Toolbar Buttons 245

How Assets are Displayed

The information for each asset or property is displayed in five columns: **Asset Description**, **Q** (Quasi-Community Property, identified by a green check mark), **Property Status** (**Still on Hand**, **Disposed of**, and **Acquired**), **Estimated Market Value**, and **Carry Value**.

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

All of the assets listed in the **Beginning Community Property Form** are automatically entered in this **Ending Community Property Form**. Likewise, All of the assets listed in the **Beginning Separate Property Form** are automatically listed in the **Ending Separate Property Form**.

See the **Entering Assets** 232 procedure in the **Beginning Community Property Form** for a general overview of the steps to enter assets.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value and any other necessary information to an asset entry.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Ending Separate Property Form

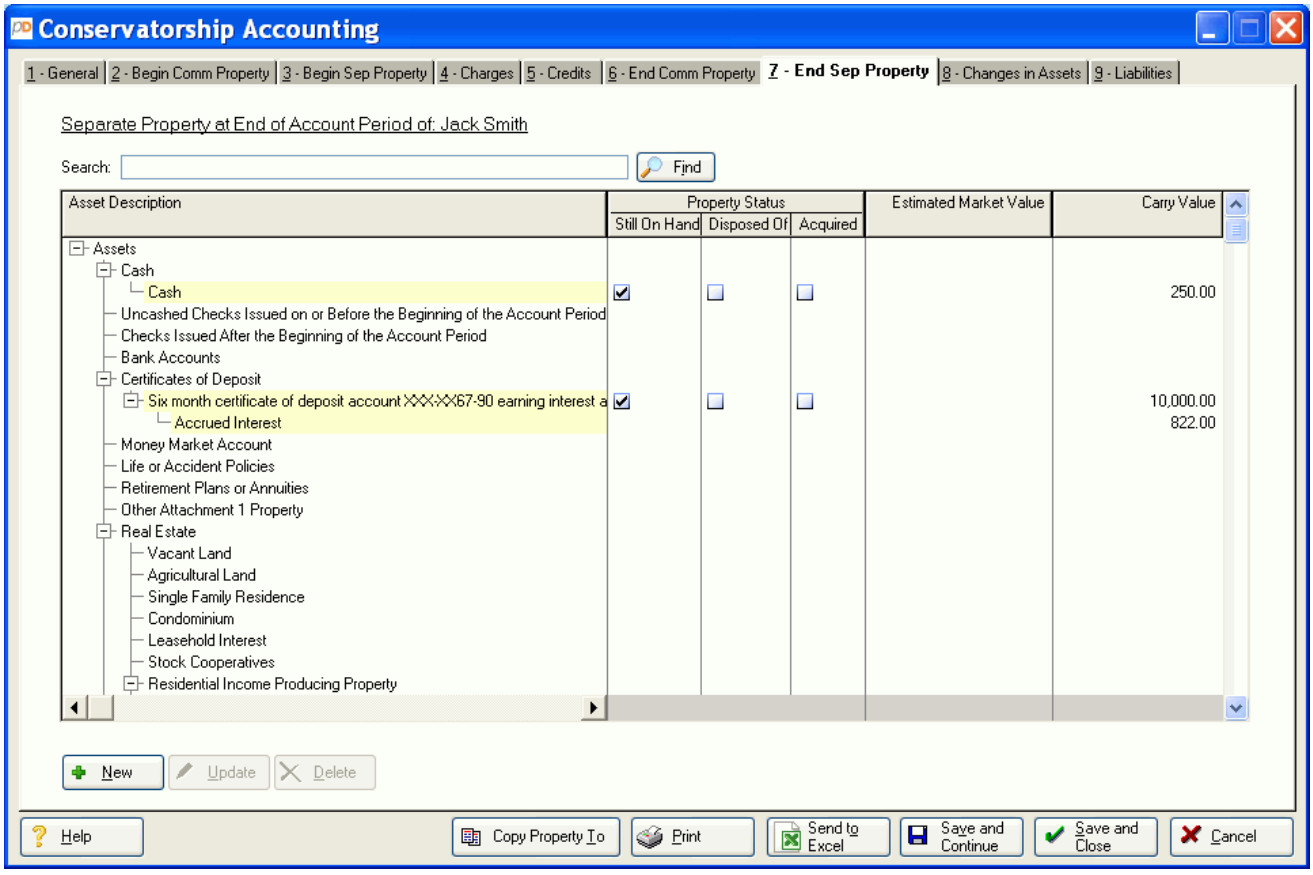


Figure 12, Ending Separate Property Form

This form collects separate property assets as of the ending date of the accounting period. All assets appearing in the **Beginning Separate Property Form** automatically appear in the **Ending Separate Property Form**. If the status or condition of the asset has changed; its value appreciated or depreciated; the asset has been sold or otherwise disposed of; such asset information should be edited or updated to reflect its value as of the ending date of the accounting period.

Schedule E (Attachment 1) cash-type assets are assets that may be appraised by the conservator and listed on Attachment 1 of the inventory. All other non-cash assets must be appraised by a probate referee and listed on Attachment 2 of the inventory and appraisal. List all non-cash assets, group them by the inventory in which their latest appraised values appear, or if none, as after-acquired assets in order of their purchase dates.

You will only need to enter new assets acquired through either the **Charges Form** or the **Credits Form**.

Scroll down or click the links to jump to the help section in this topic you want to see:

How Assets are Displayed 246
Locating Asset Descriptions 247
Entering Assets 247
Using Toolbar Buttons 247

How Assets are Displayed

The information for each asset or property is displayed in four columns: **Asset Description**, **Property Status** (**Still on Hand**, **Disposed of**, and **Acquired**), **Estimated Market Value**, and **Carry Value**.

Entries of actual assets are highlighted in yellow.

You can click the ⊞ or ⊟ symbols on the listing to expand or contract a particular category.

Locating Asset Descriptions

- Use the scroll bar at the right side of the window to scroll through the list.
- Click on the top entry of the window, ⊟ **Assets,** and type the first letter of the description you wish to locate. Each letter you enter will move the highlight through the list to the next description beginning with the letter. When it reaches the end, it will start again at the first matching description.
- Enter a search word or phrase in the blank field above the **Asset Description** column and click **Find.** The first description title that contains the word or phrase will be highlighted. Each time you click **Find,** the next matching asset will be highlighted, and the highlight will continue through the list of matches, then start again at the first match. If no matches exist, a window will appear to tell you this.

  NOTE: Searches and keystroke moves start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset Description** list.

Entering Assets

All of the assets listed in the **Beginning Community Property Form** are automatically entered in the **Ending Community Property Form**. Likewise, All of the assets listed in the **Beginning Separate Property Form** are automatically listed in this **Ending Separate Property Form**.

See the **Entering Assets** 232 procedure in the **Beginning Community Property Form** for a general overview of the steps to enter assets.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value, and any other necessary information to an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Changes in Asset

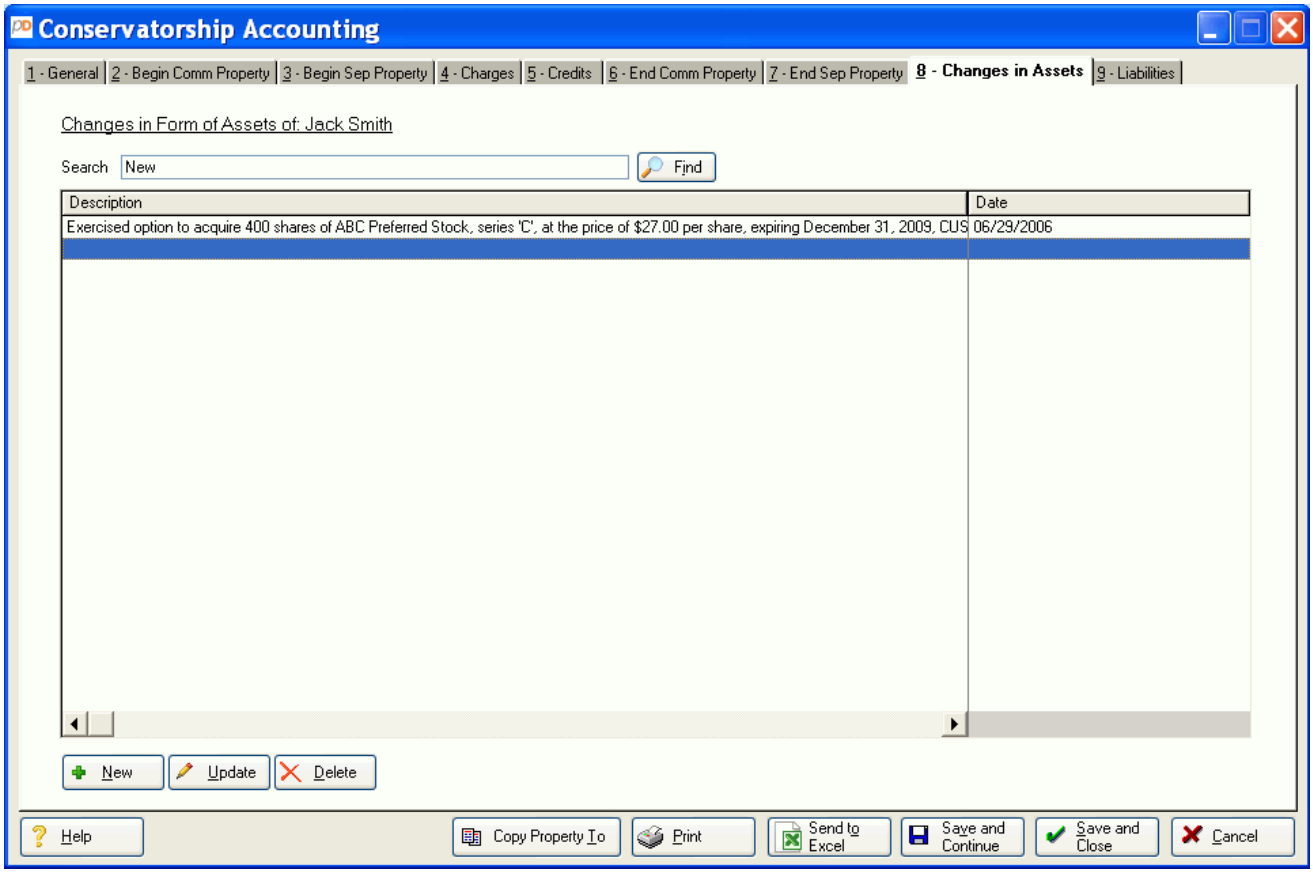


Figure 13, Changes in Assets Form

This form allows you to record all transactions that changed the form of assets during the accounting period. If the entries reflect changes in asset values, they should also be recorded in one of the appropriate forms (**Charges Form**, **Credits Form**, **Ending Community Property Form**, or **Ending Separate Property Form**).

Click **New** to enter information on changes in the form of assets. The **Changes in Form of Asset During Accounting Period** 248 window appears.

Using Toolbar Buttons to Work With Assets

First, find and click the line containing the asset. You can now use the toolbar buttons at the bottom of the window to perform the functions indicated below:

New - Add description, value, and any other necessary information to an asset to the inventory.

Update - Modify a highlighted asset.

Delete - Remove a highlighted asset.

Changes in Form of Asset During Accounting Period

The **Changes in Form of Asset During the Accounting Period** window is where you record transactions that affect a change in the form of an asset. These are transactions that may report damage to an asset, appreciation or depreciation over time, zoning, condemnation, purchases of additional assets

of the same type, or other proceedings that affect the form of an asset.

To record entries in the **Changes in Form of Asset During the Accounting Period** fields, perform the following steps:

1. In the **Description** field, enter all available information concerning the change. For example: Purchase of an additional 400 shares of ABC preferred Stock, Series "C," NASDAQ ticker symbol ABCC, CUSIP No. XXXXX5678 at the price of $27.00/share, plus $15 brokerage transaction fee.
2. In the **Comment** field, add any information you feel would help in understanding the change in the form of the asset information in any of the fields. For example, This purchase of 400 shares, together with the current position of 100 shares, changes the asset form to 500 shares on hand.
3. Enter the **Date** in mm/dd/yyyy format or click the calendar icon to easily Select a Date 263 from a pop-up calendar.

Button Descriptions and Functions

Help - Click this button to see help on completing this window.

Add Another - This button will only appear when you are adding a new liability. Click this button to add another liability.

OK - When you are finished adding liabilities of this type, click this button to add the information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Liabilities

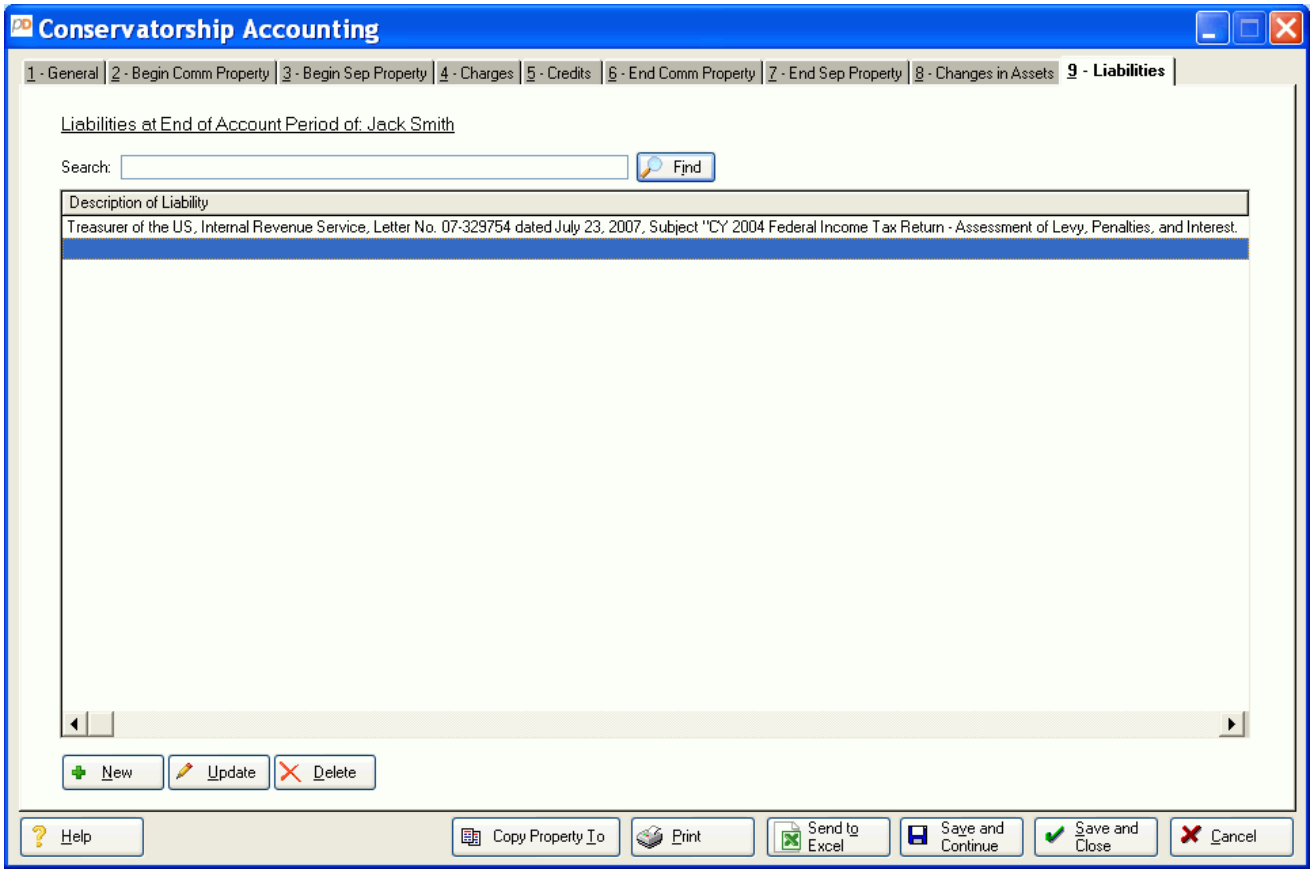

Conservatorship Accounting
1 - General
2 - Begin Comm Property
3 - Begin Sep Property
4 - Charges
5 - Credits
6 - End Comm Property
7 - End Sep Property
8 - Changes in Assets
9 - Liabilities
Liabilities at End of Account Period of: Jack Smith
Search:
Find
Description of Liability
Treasurer of the US, Internal Revenue Service, Letter No. 07-329754 dated July 23, 2007, Subject "CY 2004 Federal Income Tax Return - Assessment of Levy, Penalties, and Interest.
New
Update
Delete
Help
Copy Property To
Print
Send to Excel
Save and Continue
Save and Close
Cancel

Figure 14, Liabilities Form

The **Liabilities Form** allows you to list those liabilities of the estate or trust as of the ending date of the accounting period.

All of the following shall be included as liabilities as of the ending date of the accounting period:

- All liabilities which are a lien on estate or trust assets.
- Taxes due but unpaid as shown on filed returns, or assessments received subsequent to the filing of returns.
- All notes payable as of the ending date of the accounting period.
- Any judgments for which the estate or trust is liable.
- Any other material liability.

The following current and future periodic payments are *not* to be included on this form:

- Rents
- Salaries
- Utility payments
- Other recurring payments

Click **New** to enter liability information. The **Liabilities at End of Account Period** 250 window appears.

Ending Liabilities

To enter liabilities as of the ending date of the accounting period, perform the following steps:

1. In the **Description** field, enter all available information concerning the liability. For example: Treasurer of the US, Internal Revenue Service, Letter No. 07-329754 dated July 23, 2007, Subject "CY 2004 Federal Income Tax Return - Assessment of Levy, Penalties, and Interest."
2. In the **Comment** section add any information you feel would help in understanding the information in any of the fields.

Button Descriptions and Functions

Help - Click this button to see help on completing this window.

Add Another - This button will only appear when you are adding a new liability. Click this button to add another liability.

OK - When you are finished adding liabilities of this type, click this button to add the information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Attachment 1 Property

Attachment 1 Property Overview

Cash assets are assets that may be appraised by the conservator and listed on Attachment 1 of the Inventory and Appraisal. Cash items can be immediately converted to cash on a dollar for dollar basis (meaning the value does not fluctuate). Rare coins or currency are not Attachment 1 items.

Asset description categories which qualify as **Attachment 1 Property** are shown below. Since the entry fields vary considerably across these asset windows, please click the **Help** button on each asset window for detailed help with entering information for the asset.

Cash

Uncashed Checks Issued On or Before the Beginning of the Account Period

Bank Accounts

Certificates of Deposit

Money Market Account

Life or Accident Policies

Retirement Plans or Annuities

Other Attachment 1 Property

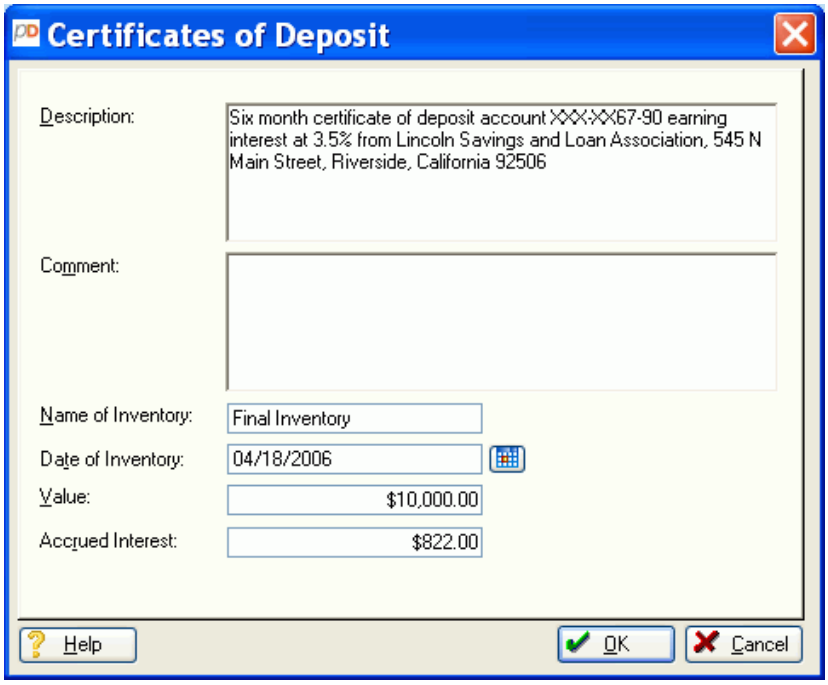


Figure 15, Certificate of Deposit

Button Descriptions and Functions

Help - Click this button to see help on completing specific asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Checks Issued After Appointment of Conservator

To enter new assets or update existing asset descriptions in this category, follow the steps below:

1. Enter a **Description** of the asset in the designated field. This may be checks received by the estate after the date of appointment of a Conservator, health insurance payments, rebates, utility refunds, returned deposits, etc. Example: "Check number 24598, dated November 11, 2006, from Southern California Gas Company, representing a refund of a utility deposit."
2. In the **Comment** section, enter any relevant information which might further aid in identifying the asset.
3. Enter the **Name of Inventory**. For example: Final.
4. In the **Date of Inventory** field, list the date the inventory was signed in mm/dd/yyyy format or

click the calendar icon to easily **Select a Date** 263 from a pop-up calendar.

5. Enter the **Amount** of the check issued after the appointment of the conservator. The program will convert whole dollar entries to currency format for you.
6. If you are adding/updating an asset on the **Beginning Community Property Form** or the **Ending Community Property Form**, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Inventory & Appraisal** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Real Estate Assets

Real Estate Assets Overview

Asset description categories in the **Real Estate** listing are shown below. Scroll down to **Entering Asset Information** to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Vacant Land
Agricultural Land
Single Family Residence
Condominium
Leasehold Interest
Stock Cooperatives
Residential Income Producing Property
Commercial or Industrial Property
Life Estate
Remainder and Reversionary Interest
Time Share Interest
Other Real Estate

If a real estate asset doesn't fit into any other category, enter the asset in the **Other Real Estate** category.

Entering Asset Information.

The asset description window opens with seven fields for entering data: the **Property Address** field, **Property Description** field, the **Comment** field, the **Name of Inventory** field, the **Date of Inventory** field, the **Estimated Market Value** field, and the **Carry Value** field. If you are entering assets on the **Beginning Community Property Form** or the **Ending Community Property Form**, it also contains a check box for selecting **Quasi-Community Property**.

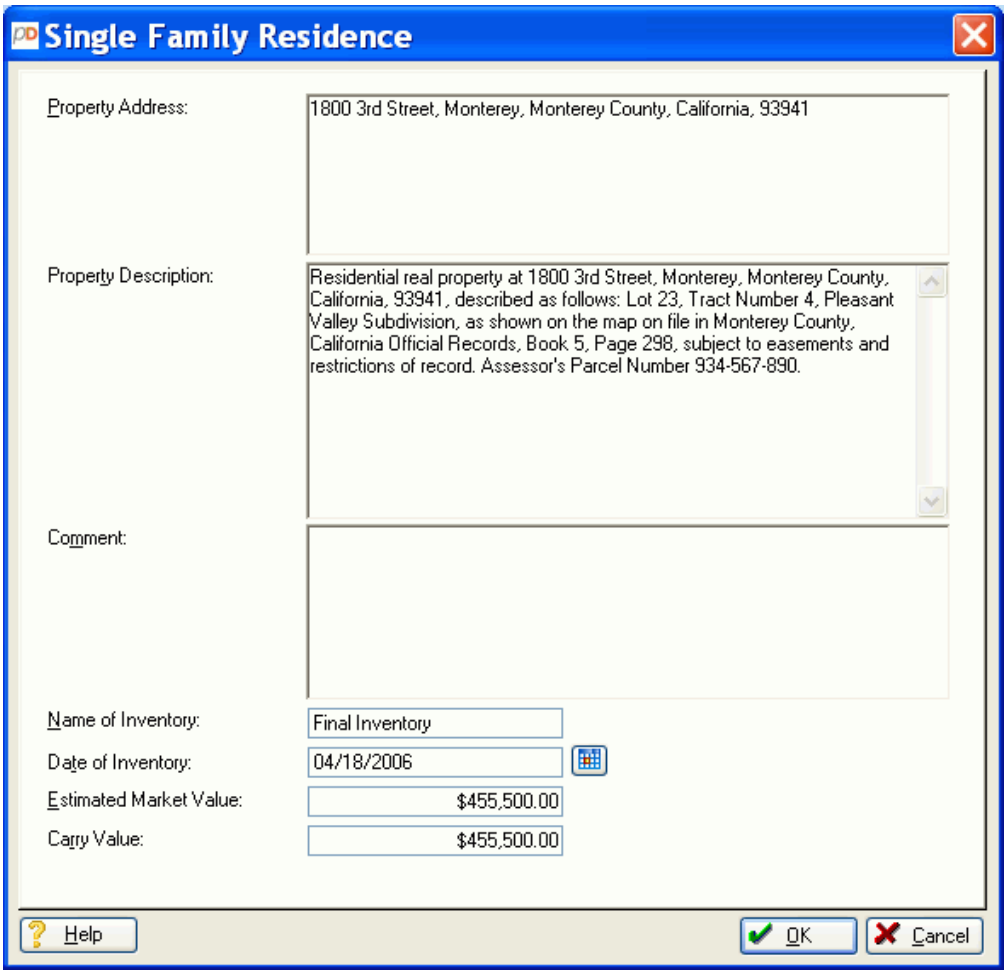

Single Family Residence
Property Address:
1800 3rd Street, Monterey, Monterey County, California, 93941
Property Description:
Residential real property at 1800 3rd Street, Monterey, Monterey County, California, 93941, described as follows: Lot 23, Tract Number 4, Pleasant Valley Subdivision, as shown on the map on file in Monterey County, California Official Records, Book 5, Page 298, subject to easements and restrictions of record. Assessor's Parcel Number 934-567-890.
Comment:
Name of Inventory:
Final Inventory
Date of Inventory:
04/18/2006
Estimated Market Value:
$455,500.00
Carry Value:
$455,500.00
Help
OK
Cancel

Figure 16, Example Single Family Residence

Click the **Help** button for detailed help with entering information for each asset.

To enter new assets or update existing asset descriptions in this category, perform the following steps:

1. **Property Address -** Enter the physical address of the property in line form For example: 12 Mockingbird Street, Berkeley, CA 94704.
2. **Property Description** - Enter the complete legal description of the asset. Click the **Help** button to see a detailed description of the information required for the field.
3. **Comment** - Enter any relevant information which might further aid in identifying the asset.
4. **Name of Inventory** - Enter the name of the inventory For example: Final or Partial.
5. Enter the **Date of Inventory** in mm/dd/yyyy format, or click the calendar icon to easily **Select a Date** 263 from a pop-up calendar.
6. **Estimated Market Value -** Enter the referee-appraised value of the real estate or interest. The program will convert whole dollar entries to currency format for you.
7. **Carry Value** - Enter the **Carry Value** for the single family residence. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the conservator is its purchase price.)
8. **Quasi-Community Property -** This check box is only displayed when you enter assets on the **Beginning Community Property Form** or the **Ending Community Property Form**. Click

the box if the real estate qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Real Estate** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Business Interests Assets

Business Interests Assets Overview

Asset description categories in the **Business Interests** listing are shown below. Scroll down to **Entering Asset Information** to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Closely Held Corporation
Limited Partnerships
General Partnerships
Sole Proprietorships
Limited Liability Companies
Other Business

If a business asset doesn't fit into any other category, enter the asset in the **Other Business** category.

Entering Asset Information

The window used for business interests assets contains six fields. If you are entering assets on the **Community Property** form, it also contains a check box.

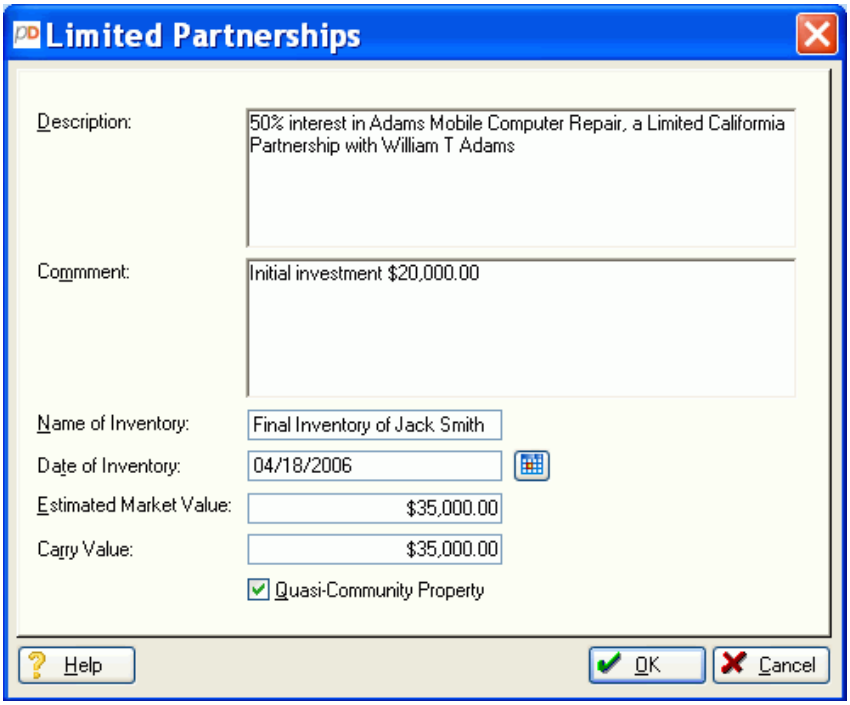


Figure 17, Limited Partnership Example

To enter new assets or update existing asset descriptions in this category, perform the following steps:

1. **Description -** Enter a description of the business interest. Click the **Help** button to see a detailed description of required entries for each business interest.
2. **Comment** - Enter any relevant information which might further aid in identifying the asset.
3. **Name of Inventory** - Enter the name of the inventory. For example: **Final** or **Partial**.
4. **Date of Inventory** - Enter the date the inventory was signed in mm/dd/yyyy format, or click the calendar icon to easily **Select a Date** 263 from a pop-up calendar.
5. **Estimated Market Value -** Enter the estimated market value for the interest. The program will convert whole dollar entries to currency format for you.
6. **Carry Value** - Enter the **Carry Value** for the business interest. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the conservator is its purchase price.)
7. **Quasi-Community Property -** This check box is only displayed when you enter assets on the **Beginning Community Property Form** or the **Ending Community Property Form**. Click the box if the business interest qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Business Interests** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Tangible Personal Property

Tangible Personal Property Assets Overview

Asset description categories in the **Tangible Personal Property** listing are shown below. Scroll down to **Entering Asset Information** to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Furniture, Furnishings and Miscellaneous
Jewelry
Coins or Stamps
Work of Art
Mobile Homes
Motor Vehicles
Boat, Airplane
Livestock and Breeding Animals
Other Personal Property

If a personal property asset doesn't fit into any other category, enter the asset in the **Other Personal Property** category.

Entering Asset Information

The window used for personal property assets contains six fields. If you are entering assets on the **Beginning Community Property Form or the Ending Community Property Form**, it also contains a check box.

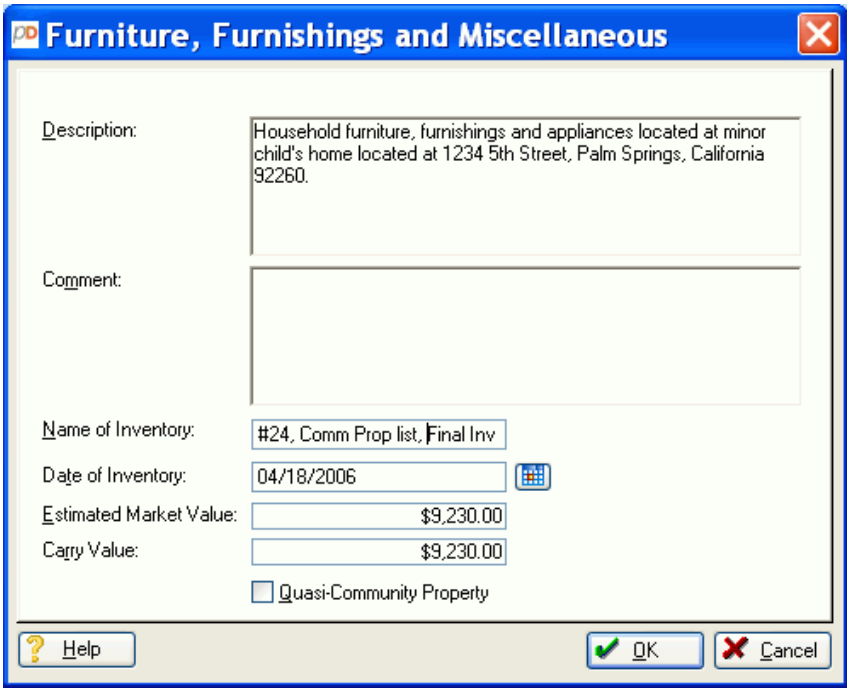


Figure 18, Example Tangible Personal Property

To enter new assets or update existing asset descriptions in this category, perform the following steps:

1. **Description -** Enter a description of the property. Click the **Help** button to see a detailed description of required entries for each type of property.
2. **Comment** - Enter any relevant information which might further aid in identifying the asset.
3. Enter the **Name of Inventory**. For example: Final or Partial.
4. Enter the **Date of Inventory** in mm/dd/yyyy format or click the calendar icon to easily **Select a Date** 263 from a pop-up calendar.
5. **Estimated Market Value -** Enter the estimated value of the personal property asset. The program will convert whole dollar entries to currency format for you.
6. **Carry Value** - Enter the **Carry Value** for the asset. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the conservator is its purchase price.)
7. **Quasi-Community Property -** This check box is only displayed when you enter assets on the **Beginning Community Property Form** or the **Ending Community Property Form**. Click the box if the personal property asset qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Tangible Personal Property** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Debt or Promissory Note

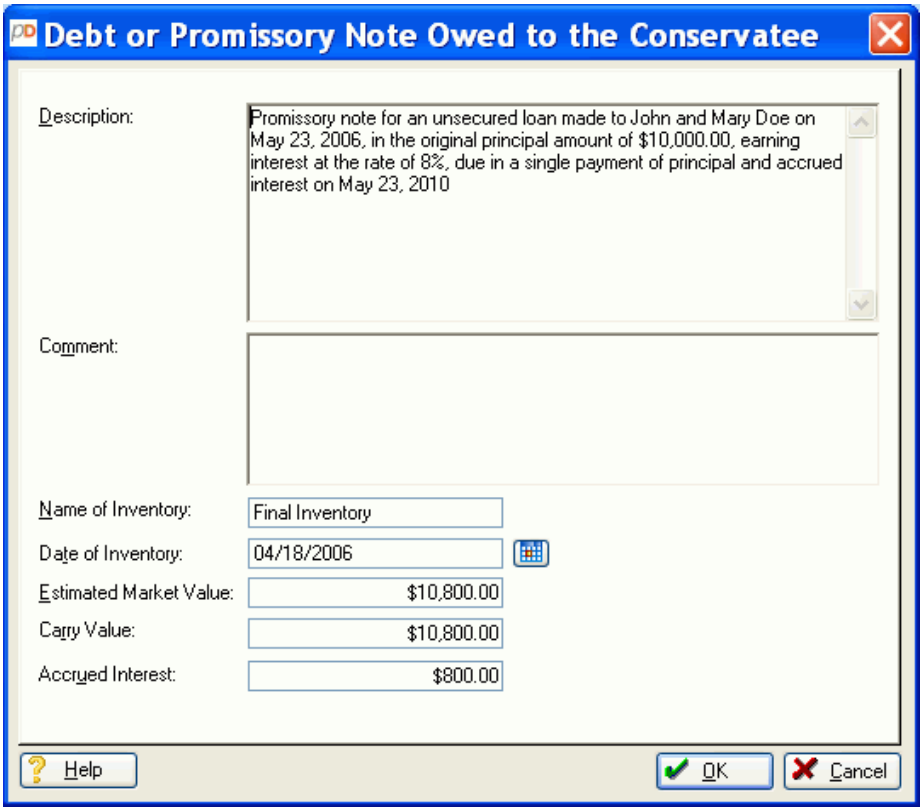

Debt or Promissory Note Owed to the Conservatee
Description:
Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original principal amount of $10,000.00, earning interest at the rate of 8%, due in a single payment of principal and accrued interest on May 23, 2010
Comment:
Name of Inventory:
Final Inventory
Date of Inventory:
04/18/2006
Estimated Market Value:
$10,800.00
Carry Value:
$10,800.00
Accrued Interest:
$800.00
Help
OK
Cancel

Figure 19, Debt or Promissory Note Owed to the Conservatee

To enter a debt or promissory note owed to the conservatee, or to update existing asset descriptions in this category, follow the steps below:

1. Enter a **Description** in the designated field. Include the terms of the note, such as the date of the debt or note and the final date due, the names of the borrowers, the original amount borrowed, the payment amount and dates of scheduled payments, the interest rate, and any security for the loan. If real property secures the loan, include either the Assessor's Parcel Number or the legal description of the property. For example: "Promissory note for an unsecured loan made to John and Mary Doe on May 23, 2006, in the original principal amount of $10,000.00, earning interest at the rate of 8%, due in a single payment of principal and accrued interest on May 23, 2010."
2. In the **Comment** section, enter any relevant information which might aid in identifying the asset.
3. Enter the **Name of Inventory**. For example: **Final** or **Partial**.
4. Enter the **Date of Inventory** in mm/dd/yyyy format or click the calendar icon to easily **Select a Date** 263 from a pop-up calendar.
5. Enter the **Estimated Market Value** for the asset. The program will convert whole dollar entries to currency format for you.
6. Enter the **Carry Value** of the asset. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the conservator is its purchase price.
7. Enter the amount of any **Accrued Interest** for the debt or note that had accrued as of the date of appointment of the conservator but had not yet been credited.

8. If you are adding/updating an asset on the **Beginning Community Property Form** or the **Ending Community Property Form**, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset on the **Beginning Community Property Form** or the **Ending Community Property Form** after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Securities

Securities Assets Overview

Asset description categories in the **Securities** listing are shown below. Scroll down to **Entering Asset Information** to see general help for entering information for assets in this listing. Click the **Help** button on each asset window to see detailed help for entering information for the asset.

Brokerage Accounts
Common and Preferred Stocks
Mutual Funds
Stock Options
Corporate, State and Municipal Bonds
United States Treasury Notes and Bonds
Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC) Security
United States Savings Bonds
Other Securities

If a **Securities** asset doesn't fit into any other category, enter the asset in the **Other Securities** category.

Entering Asset Information

The windows used for **Securities** assets contains varying numbers of fields. If you are entering assets on the **Beginning Community Property Form** or the **Ending Community Property Form**, the window also contains a check box.

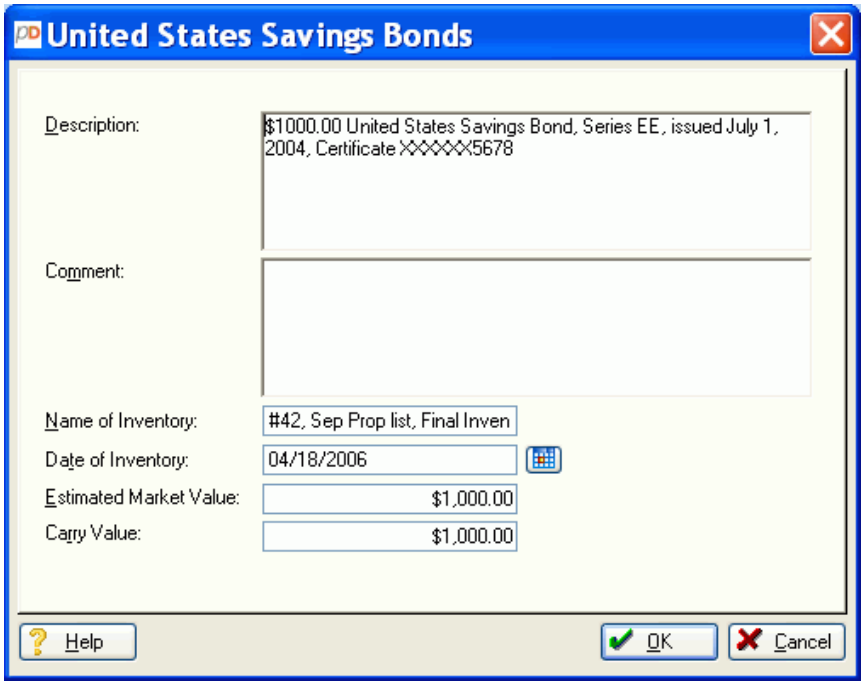


Figure 20, US Savings Bond

Description - Enter a description of the security. Click the **Help** button to see a detailed description of required entries for each type of security.

Comment - Enter any relevant information which might further aid in identifying the asset.

Name of Inventory - Enter the **Name of Inventory**. For example: Final or Partial.

Date of Inventory - Enter the **Date of Inventory** in mm/dd/yyyy format or click the calendar icon to easily **Select a Date** 263 from a pop-up calendar.

Estimated Market Value - Enter the estimated value of the personal property asset. The program will convert whole dollar entries to currency format for you.

Carry Value - Enter the **Carry Value** for the asset. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the conservator is its purchase price.)

Quasi-Community Property - This check box is only displayed when you enter assets on the **Beginning Community Property Form** or the **Ending Community Property Form**. Click the box if the security qualifies as Quasi-Community Property. A green check mark will be displayed in the **Q** column for the asset on property forms after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing specific **Securities** asset windows.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Other Intangible and Unscheduled Property Assets

This window helps you enter assets which do not fit into any other listed category. To enter new assets or update existing asset descriptions in this category, perform the following steps:

1. Enter a **Description** of the asset in the designated field. Include a full description of intangible property not included in any of the previously described categories that was owned by the conservatee. For example: "Copyright and future royalty stream from 2001 book, 'The Life and Times of J.J. Schmidt', ISBN no. 1234567890, published by Narcissus Press."
2. In the **Comment** section, enter any relevant information which might aid in identifying the asset.
3. Enter the **Name of Inventory**. For example: **Final** or **Partial**.
4. Enter the **Date of Inventory** in mm/dd/yyyy format or click the calendar icon to easily **Select a Date** 263 from a pop-up calendar.
5. Enter the **Estimated Market Value** of the stock. The program will convert whole dollar entries to currency format for you.
6. Enter the **Carry Value** of the asset. (The carry value of an asset that is included in an inventory is its appraised value. The carry value of an asset purchased for the estate after appointment of the conservator is its purchase price.)
7. If you are adding/updating an asset on the **Beginning Community Property Form** or the **Ending Community Property Form**, the **Quasi-Community Property** check box is displayed. Click the box if the asset qualifies as Quasi-Community Property. A green check mark will then be displayed in the **Q** column for the asset after you complete the asset entry. You can remove the check mark by clicking the box again.

Button Descriptions and Functions

Help - Click this button to see help on completing the asset window.

Add Another - This button will only appear when you are adding a **new** asset. Click this button to add another asset of the same type.

OK - When you are finished adding assets of this type, click this button to add the asset information to the **Conservatorship Accounting** program and close the window.

Cancel - Click this button to close the window. Your entries will not be saved.

Selecting a Case

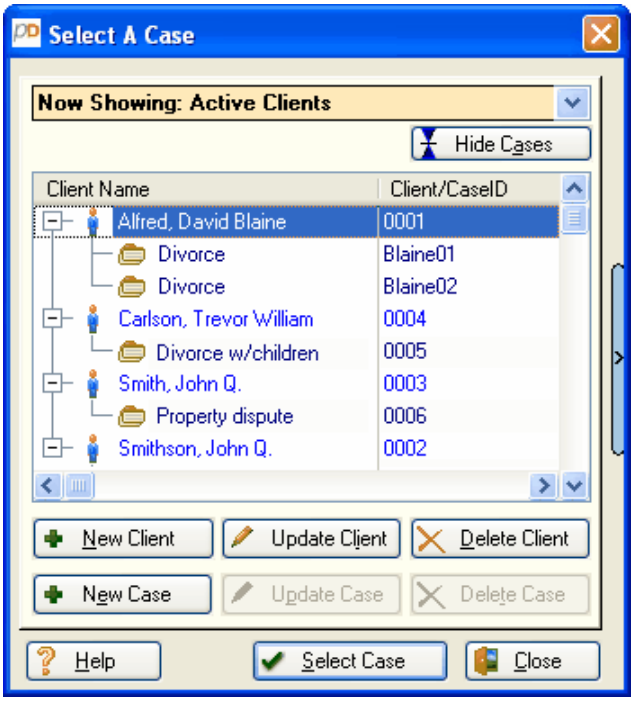


Figure 21, Selecting a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input. It lists existing ProDoc clients and all cases for the clients. You can use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

- Double-click a displayed case.
- Click on a displayed case and then press the **Enter** key.
- Click on a displayed case and then click the **Select Case** button.

To find a case that's not displayed:

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients.** Other choices are **All Contacts**, **Closed Contacts**, **Private Clients**, and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

Selecting a Date

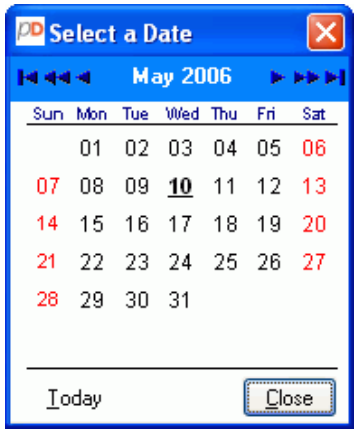


Figure 22, Select a Date Window

This window helps you quickly complete date fields. Tools and buttons on this calendar tool, depicted as Figure 22, include:

- and - Click to move back or forward one year.
- and - Click to move back or forward one month.
- and - Click to move back or forward one week.
- Use **Up** and **Down** arrow keys to move back and forward one week.
- Use **Left** and **Right** arrow keys to move back and forward one day.
- Click **Today** to move the underline/highlight to today's date.
- Click on the date to choose it or press the **Enter** key to choose the underlined date.
- Click **Cancel** to close the calendar without choosing a date.

Glossary

Browse for Folder

This window appears when you click the **Browse** button next to a directory dialog box. You use this window to search through folders to choose where you wish to save files.

You can navigate through the folders by using both the vertical and horizontal scroll bars on the window. You can also use keyboard navigation keys (arrow, Page Up/Down, Home, etc.) to move to different folders.

Available file system folders and drives are shown in a tree structure similar to the one used by Windows Explorer. You can click ⊞ to expand the tree for the folder/drive, or click ⊟ to contract the tree.

Double-click a folder to select it, or highlight the desired folder and click the **OK** button. Click the **Cancel** button to exit the window without choosing a folder.

Clipboard

The Clipboard is a temporary Windows storage area for objects like text blocks. You insert text to the clipboard with the cut or copy commands. Text in the clipboard can be pasted into the document at the current location.

Common Controls on Browse Windows

The following fields, buttons, keys, and menu items are commonly found on browse windows in ProDoc.

Fields and Buttons

Add or **New** - Opens dialog window to add a new record to the database.

Change or **Update** - Opens dialog window to change the details of the record which is highlighted at the time the button is selected.

Delete - Deletes the record which is highlighted at the time the button is selected.

Select - Selects the record which is highlighted at the time the button is selected.

Keys

Insert - Opens dialog window to add a new record to the database.

Delete - Deletes the record which is highlighted at the time the delete key is pressed.

Menu Options

Close - Closes the window and returns you to the previous window.

Edit or Change - Opens a drop-down menu containing options for adding, changing and deleting records.

Help - Calls up the standard Windows help system.

On some browse screens, you can right click on a record listing to display a floating drop-down menu with the new, update, and delete options.

Configuration File

Configuration files let you customize your documents in ways not possible through the Formatting Options windows. Configuration files can contain headers, footers, page numbers, fonts, or any other feature you would normally put at the beginning of a document. Refer to your particular word processor's documentation to determine how to create a file containing headers, footers, etc.

When a document is assembled, ProDoc checks for a configuration file. If one or more configuration files that apply to the document exist, ProDoc inserts the highest priority configuration file into the document. If the configuration file sets the value of one of the Formatting Options items, e.g. left margin, that value will override any value set in the Formatting Options window.

There are three types of configuration files:

- The **global configuration file** applies to all documents and has the highest priority. It is stored as GLOBAL.CIF in the ProDoc home directory.
- A **volume configuration file** applies to all documents in one volume. Each file is stored as VOLUME.CIF in the subdirectory of the volume to which applies.
- A **specific document configuration file** applies to a single document. Each is stored as DOCNAME.CIF, where "DOCNAME" is the filename of the form from which the document is generated, in the subdirectory of the volume containing the form.

Copy

Copying text is a common word processing procedure. The text is duplicated to the clipboard. From the clipboard, you can paste the text to another section of the document.

Cut

Cutting text is a common word processing procedure. The text is removed (cut) from the document and stored in the clipboard. From the clipboard, you can paste the text to another section of the document.

Default Answers

Default answers are automatically displayed as a proposed answer when a question is asked by ProDoc. This feature saves a tremendous amount of time for answers which are the same over and over again. One example of a default answer is the address block for a law office.

When a default answer is displayed during document assembly, you can accept it and keep going or simply type over it if the answer you want is different than the default. You can set your own default answers. ProDoc will use its logic capabilities to create default answers.

Directory

The location where you want to save completed documents. This must include a valid drive (floppy drive or hard drive) and the subdirectories if applicable. For example, since ProDoc is normally located in the PRODOC subdirectory on your hard drive (C drive), the directory would be C:\PRODOC.

Filename

A filename is the name of the file under which you want to save completed documents. Filenames can be as descriptive as the full name of the form, e.g. Final Divorce Decree. They can also include conventional word processor file extensions such as .doc or .wpd.

Form Sets

Form sets are groups of related forms which are often assembled at the same time. You can define these sets of forms so that during a document assembly session, you can select a number of forms by choosing the name of the set.

Global

Global refers to items that apply across all ProDoc volumes.

Global Questions

Global questions are questions which apply across all ProDoc volumes.

Highlight

Highlight means to set focus to an item that you want acted upon. On a list in a browse screen, an item is highlighted when it is in reverse color. Buttons and other items on a screen are highlighted when they are in reverse color or when a faint dotted outline appears on them. Use the up and down cursor keys to highlight an item in a browse list and use TAB and SHIFT+TAB to highlight other items on a window.

License

License is authorization to use software on a properly registered computer under the terms of a legal agreement. Your use of ProDoc is governed by a License Agreement which spells out how the program can be used. The software can only be used by an authorized licensee under the specific limitations set forth by the License Agreement.

Master Forms

Master forms are the text files ProDoc uses to assemble your documents. They contain paragraphs of legal text and tokens to indicate the questions you must answer. These documents are stored as word processing files and can be modified for your specific practice.

Paste

Pasting text is a common word processing procedure. The text must be cut or copied to the clipboard. From the clipboard, the text is inserted into the document at the current cursor location.

QuickText

QuickText allows you to store custom blocks of text to paste into answers. You use QuickText for items like an attorney's signature block where it would not be appropriate to have a default answer (as for a firm with several attorneys), but you do not want to type the information every time. Store each entry as a QuickText item and paste the data as an answer where it is required.

Registration

Registration is usually completed when you first install and run ProDoc. Your registration will remain current as long as you use the WebUpdate feature to install periodic updates or load the updates from CD if you don't have an Internet connection. If you need to register ProDoc again, you can click the following link to view the **registration processes** 80.

Select

You may select an item by:

1. Clicking on an item with the left button of your mouse.

2. Highlighting an item and then pressing ENTER.
3. If an item has a hot key, holding the ALT key while pressing the hot key.

Supplemental Forms

Supplemental forms are forms which you add to a volume to extend the power of ProDoc. These forms are not included in the volume(s) provided with the program, but are created by the user for a specific purpose.

Token

Tokens are the six character codes used to identify a question or other object in ProDoc. When ProDoc finds a token in a master form, that token tells it what question to ask, how much room to provide for the answer, etc. As an example, a token could appear in master forms as ~P1234S.

ToolTips

ToolTips are small help balloons that appear when the cursor is placed over a control (menu, field, or button). These tips show the purpose of the control and what it will do.

Volume

Volumes are collections of master forms and data files which are used by ProDoc. Each volume usually deals with a single area of law, such as Real Estate, Family Law, Litigation, etc. Volumes must be installed before they can be used by ProDoc.

Volume Questions

Volume questions are questions supplied with a particular volume, such as Business Organizations or Family Law. These questions are used to assemble a document for your specific legal matter and insert the appropriate information for your client and case.

Appendices

Appendix A - Networking ProDoc

Benefits

Networking with ProDoc can provide your law office with many benefits, including:

Software Sharing - Networking allows you to install ProDoc to a central location on your network server or host computer which permits all other computer work stations to have concurrent access to the program. By networking your computers, master forms libraries (templates), client and case data and completed documents can then be shared by all users.

Increased Office Productivity – With ProDoc networked, you can share client and case information by storing client data and completed documents in a central location, providing easy access for everyone networked. A central location also streamlines your backup procedure.

Decreased Equipment Cost – With a network, everyone in your office can share printers, fax machines, modems and CD-ROM drives. For example, if your firm has two attorneys, two secretaries, and an office manager, you might need three printers, one for each attorney / secretary and one for the office manager. A network also allows you to extend the useful lives of older PCs by providing access to newer PCs and their associated peripherals.

Drawbacks

Networking does have some drawbacks. Two of the more obvious ones are:

Cost – Expenses to network a law office can be higher than usual depending on how sophisticated a network you want to create.

Knowledge – Networks require greater expertise to set up and maintain than stand alone personal computers. Is there someone on your staff with networking skills or who is willing to learn? If not, can you afford to hire someone with networking knowledge?

Types of Networks

There are two fundamental types of networks, peer-to-peer and client-server. Each type has its own capabilities and limitations. Which type of network you elect to use depends primarily on your firm's size, requirements and budget. ProDoc is compatible with both peer-to-peer and client-server networks as discussed on the next page.

Peer-To-Peer Networks - In a peer-to-peer network set up, one computer will serve as a "Host" computer on which ProDoc is preferably installed. A peer-to-peer network is a good choice when you have only a few computers, you do not expect your network to expand in the near future, your budget is restricted, and security is not an issue. Each user does the day-to-day administration at their computer. There is no central administration to maintain and a relatively low level of security. The cost of setting up a peer-to-peer network is also minimal. You need not purchase a dedicated network operating system, a server. All that's needed is a network interface card for each computer, a network hub and sufficient network cable to physically link all computers together. It is recommended you use Windows 98/ME/2000/XP/Vista or NT workstation 4.0. Peer-to-peer networks normally require less administration. The only drawback is an increased potential for slower data exchange rate between the workstation and the host computer. Your local computer technician can probably assist you in setting up this type of network.

Client-Server Networks - This is the more sophisticated type of networking environment. A sole dedicated computer acts as the "network server". The computers networked to it act as "clients". ProDoc is preferably installed only on the server. A common misconception is that you must purchase a large powerful computer marketed as a server. While that is sometimes true, small networks may only require a reasonably capable PC running a server version of a networking operating system such as Windows NT or Novell NetWare. It is the job of the dedicated network server (sometimes called a "file-server" or "Application-Server") to keep track of all users and validate their log on requests. The server stores most, if not all, applications and data files, provides centralized administration for the network, and a higher level of security for your programs and files. In a client-server network, all users must initially log on to gain access to the server. A network administrator can assign permissions to users so that they only gain access to the resources they need. This protects your information from unauthorized access. Otherwise, people might attempt to gain access to confidential files on your computer via the network. This type of a network is usually more expensive to install. In addition to network cards, a network hub and cables, you will need to purchase a network operating system such as Windows NT or Novell NetWare. It is highly recommended that you consult a network specialist for assistance for this type of network.

Preferred Network Installation Configuration

If your office computers are networked, we recommend you install ProDoc on your network server or "Host" computer.

For a client-server network, ProDoc should normally be installed only on the dedicated network server. For a peer-to-peer network, ProDoc should be similarly installed only on the computer you have designated as the Host computer.

Each Windows client workstation or peer computer should have a shortcut icon on its Windows desktop to start ProDoc. Refer to "Setting Up User Workstations", discussed later in this appendix, for assistance with creating shortcuts and icons.

This installation method creates a centralized database for storage of client and case information and data files. It also permits all network users to access Client/Case information entries made by other networked users. This eliminates duplication of data on individual workstations and ensures all documents are centrally located and contain consistent information for each client and case. A ProDoc network installation is also the simplest to keep current, since periodic ProDoc update releases only need to be installed once to the server or host computer.

NOTES:

- ProDoc is normally installed to a mapped shared network drive location such as F:\ProDoc. Optionally, you can install ProDoc under a Universal Naming Convention (UNC) scheme where computer names are substituted for a drive letter, for example \\GEORGE\PRODOC. Contact your network technician if you are uncertain about how your network is configured.
- ProDoc will work properly when deployed on Citrix and Linux based servers.

Installing and Configuring ProDoc on a Network

Step 1 - Install the program. Begin by installing ProDoc on the network server or host computer. Insert the CD and follow the prompts. If needed, consult the procedures in Chapter 1 of this manual.

NOTES:

- These procedures apply to new customers and to those customers migrating from stand-alone to a network installation. Previous users who have saved ProDoc data should follow these procedures,

then consolidate data as explained later in this appendix.

- Normally, you should only install ProDoc to a single location on the server or host computer. There is no need to separately install ProDoc on any of the other client or peer workstations. However, you may want to separately install it to a laptop or other non-networked computer.

Step 2 - Establish user access. Before ProDoc can be used, it must be "shared" with the other computers on the network. All users must have full access (read and write) to the computer/directory in which ProDoc is installed. Likewise, if completed documents are to be saved to a central directory on a network drive (preferred), all users must also have full access to that directory. Contact your local network professional for assistance.

Step 3 - Create workstation shortcuts. To enable networked users to run ProDoc from their workstations, you must create a shortcut (under Windows 98/ME/NT/2000/XP/Vista) on each workstation.

1. **Right click** anywhere in the middle of the workstation desktop.
2. From the menu, click **New** and then click **Shortcut.**
3. In the Create Shortcut dialog box, enter the Command line where ProDoc is installed. For example:**X:\PRODOC\PROWIN.EXE** (where **X** is the network drive letter where the program directory and files are located). Alternatively, you may click the **Browse…** button to browse to the correct location. Then, click **Next.**
4. In the dialog window, enter "ProDoc" as the name for the shortcut and click **Finish.**
5. To start ProDoc, simply **double click** this shortcut.

Step 3 - Run ProDoc for the first time. When starting ProDoc, you will be asked to enter your initials or login name. This is necessary in order to establish new operating parameters or access existing parameters for each network user. The first user who runs ProDoc is automatically assigned as a Supervisor. See the **Manage User Login** 13 section which explains this menu item. Supervisors can designate others as Supervisors or Users and manage various user settings.

Follow the prompts on succeeding windows to complete other setup options (described in Chapter 1).

If you are a new user with no ProDoc data or other installations, you are finished.

Migrating from Stand-alone Installations to a Network Installation

If you have established a network in your office but are still using one or more stand-alone installations, simply install ProDoc on your server or host computer. If you do not yet have a network but are planning to establish one, you will first need to decide on certain hardware and software alternatives. We recommend that you seek assistance from a computer technician in your area with networking experience.

Once you install ProDoc on your server or host computer, you will need to transfer your client/case files (if any exist) to the ProDoc directory on the server, uninstall all previous installations and create desktop shortcuts on each of the workstations as follows:

1. Follow the steps above to install ProDoc to the network server or host computer and configure workstations.
2. Double click the ProDoc shortcut icon. You will most likely receive a message indicating that ProDoc's location may have changed and asking if you want to use the old or new location. Click **OK** to open ProDoc from its new location.
3. In order to continue to use previously created client/case information, that data must be consolidated into the server's ProDoc directory. You do this by using ProDoc's **Database Transfer,** discussed in Chapter 3, as follows:

- Have your network administrator map each applicable workstation with a unique drive letter.
- Log on to ProDoc on the server from one of the workstations.
- Click **Tools** from the main screen menu, then **Database Transfer** and select **Transfer Client Data In.**
- Browse to the correct previously mapped workstation drive and double click the ProDoc directory where you will be transferring data from and click **OK**.
- The **Select Clients** window will appear listing all of the clients stored in that workstation's ProDoc directory. Normally you will click the **Select All** button and click **OK**. This will transfer all client and case information to the server's ProDoc directory. However, if you would like to selectively transfer clients, simply select the clients you want to transfer and then click **OK**.
- The client information will start transferring to the server. Please be patient as this procedure can take considerable time, depending on the size of your client list.
- You will receive a screen message when the transfer is complete. Click **OK** to return to the ProDoc main window. Repeat these steps as necessary for other applicable workstations.

  NOTE: The client/case transfer process can become complex when attempting to consolidate data for clients that exist on two or more computers. ProDoc may ask you whether two clients or two cases are really the same client and case. Carefully read the information in the question window before answering.

- Start ProDoc on the server, click **Clients & Cases** and then **Client/Case Manager** to inspect your client and case data base to make sure it is intact and includes all of the client/case data from your other installations. After verifying the data, assemble a simple document with client and case information to make sure the program is fully operational and that completed documents are saved to the desired location, preferably to a central location on the server.
- When you are confident of your new network installation, it should be safe to delete ProDoc from each workstation where it had been previously run. We recommend that you manually delete the entire ProDoc directory from the workstation's local drive by highlighting it in Windows Explorer and pressing the **Delete** key. You should also delete the ProDoc group from the C:\Windows\Start menu\Programs directory, since you will be starting ProDoc from the windows desktop shortcut.

Appendix B - How ProDoc Works

THE ASSEMBLY PROCESS

ProDoc assembles documents in a two-phase process. During the first phase, called the assembly phase, ProDoc asks questions and then uses the answers to "cut and paste" the appropriate clauses, paragraphs and words together to create the basic document. In the second phase, ProDoc asks fill-in-the-blank questions then inserts the answers into the assembled document. This is a general description, but there are exceptions to this scheme.

MASTER FORMS

The basic forms that ProDoc uses during the assembly process are called master forms (templates). This is a standard word processing document, which contains special codes called tokens in places where questions are to be asked or text is to be inserted, or at the beginning or end of blocks of text.

SUPPLEMENTAL FORMS

When you subscribe to a ProDoc volume, it contains master forms (templates). You may also add your

own forms to ProDoc as supplemental forms. The process of creating your own supplemental forms is discussed in **Appendix D** 294 of this manual.

OBJECTS

An object is a set of instructions which tells ProDoc to ask a question, insert text, perform a calculation, etc. Most of these objects are stored in database files. There are five basic types of objects used in ProDoc:

Questions - Question objects tell ProDoc to ask a question. There are two categories of questions - assembly questions and merge questions. Assembly questions are processed during the assembly phase and the answers are used to determine what clauses, paragraphs and words to insert into and delete from the document. Merge questions are normally processed during the second (merge) phase. Their answers are usually merged into the document. On occasion, a merge question may be asked early in the assembly phase when the information is needed earlier for some special purpose.

Processors - Processor objects tell ProDoc to calculate a value, manipulate pieces of text to create something different or to import a text file into the current document. There are assembly phase processors and merge phase processors.

Delete - Delete objects tell ProDoc to delete blocks of text if a particular condition exists. For example, if the user answers a question indicating they do not want a particular provision in the document, the delete object will omit the corresponding clause from the document. Delete objects are processed during the assembly phase.

Loop - Loop objects tell ProDoc to repeat sections of the master form if a particular condition exists. For example, a loop object may check to see how many sellers there are on a deed and then loop that many times creating one signature line for each seller.

Special - There are two objects, which do not contain instructions in a database. They are processed internally by ProDoc to perform a specific task. These objects are formatting objects and numbering objects. Formatting objects are used to tell ProDoc to use certain formatting characteristics such as line spacing and margin settings. Numbering objects are used for automatically numbering paragraphs in a finished document.

Most objects include logical instructions which ProDoc processes in order to determine what to do. For example, question objects often include logic, which determines whether to show a default answer and delete objects always include logical instructions, which determine whether or not to delete text.

TOKENS

When ProDoc is processing a master form, it is looking for tokens. You can think of tokens in the same manner as you think of simple merge codes you would use in WordPerfect or Word, except that they are much more flexible and powerful. When ProDoc finds a token, it looks for a matching object in the database file and then performs the instructions stored in that object. As mentioned above, the objects tell ProDoc when to ask a question, perform a calculation, delete or insert text or run a script. There are no special keys or techniques required to create a token. A token is simply a six-character word with a tilde (~) in front of it that you type into the form. A typical token would look like ~P1000V.

The first character in a token tells ProDoc what kind of object it represents. The most common types of tokens are:

A - assembly questions (for example ~A1000V)

P - merge questions (for example ~P1000V)

I - assembly insert (for example ~I1000V)

M - merge insert (for example ~M1000V)

C - calculator assembly (for example ~C1000V)

D - delete (for example ~D1000V)

E - end delete (tells ProDoc where to stop deleting (for example ~E1000V)

L - repeat a section of the master form (for example ~L1200V)

ELOOP - end of the master form section to be repeated (~ELOOPV)

F - format instruction (for example ~FLNSPV is a line spacing instruction)

N - auto numbering instruction (for example ~NR001V)

To summarize, a token is simply a name that ProDoc uses to locate the corresponding object (instructions) in its database. The first character in the token tells ProDoc what kind of object it represents.

VOLUMES

ProDoc provides a simple method for organizing your master forms into a useful forms library. Forms are grouped together in sets called volumes. A volume normally contains forms for a specific area of law or subject, such as real estate, family law, corporations, etc. This method of grouping forms together by subject makes it much easier to find and maintain those forms. A ProDoc system can contain an unlimited number of volumes.

SCOPE

A large ProDoc system may contain many volumes and many thousands of objects. If all objects for all volumes were stored in a single database, it would become an extremely large database and it would be very difficult to manage. When the volume is installed, all of the forms as well as the object database files are copied into a separate directory just for that volume. An example of an object that applies only to a particular volume would be the name of the seller in a real estate transaction. This information is only relevant to the real estate volume - it would not be useful in an adoptions volume. Therefore, that object is stored in the real estate volume's directory so that when ProDoc is assembling a deed it looks in the real estate directory for the database which contains the instructions. This type of object is said to have a volume scope.

Sometimes, however, there are certain questions or instructions, which will always be the same, no matter which volume you are assembling. An example of this would be a law firm's name. It doesn't matter whether you are preparing a will or a deed, the law firm's name will be the same in each of those two volumes. This type of object is said to have a global scope. When ProDoc processes a global object, it looks in the main ProDoc directory for the database which contains the appropriate instructions. The benefit of this mechanism is that, when you are producing forms from more than one volume in a single case, you will only have to enter the law firm's name one time instead of once for each volume you are using.

In addition to volume and global objects, you can also have supplemental objects. A supplemental object is volume specific but it is an object created by you. Your objects (questions) are stored in separate databases so that you do not have to worry about interfering with objects, which were shipped to you as part of a volume.

When ProDoc finds a token in a document, it looks at the last (sixth) character to determine what scope the object is and therefore which database to search for instructions. The three possibilities are V for volume objects, G for global objects and S for supplemental objects.

THE ASSEMBLY PHASE

The assembly phase is the initial processing stage where ProDoc processes some initial questions and then cuts and pastes text in the master form in order to create an interim form which contains all of the necessary text and clauses needed for the final document. The questions to be asked and other objects to be processed during this phase are contained in a database list, which is created for each master form.

After this list of objects has been processed, ProDoc begins scanning the master form for additional objects to process.

Delete objects: When ProDoc finds a delete object, it checks to see how a question was answered or whether some other condition exists and it determines whether to begin deleting text from the form. If text is to be deleted, ProDoc begins cutting text out of the master form one character at a time. ProDoc does not stop deleting text until it finds the appropriate end delete token which stops the deletion process.

Processor objects: When ProDoc finds a processor object, it checks to see how a question was answered or whether some other condition exists and it determines whether to insert text into the form. For example, it may check to see whether the Plaintiff is male or female and then insert the proper object (him or her) into the document.

Most questions asked in the assembly phase are assembly questions (~A), which are used to determine what clauses, paragraphs, nouns, etc. are to be inserted into or cut out of a document. An example of this would be a question asking the user to select any special provisions he wants in the document or asking what is the gender of the plaintiff. Occasionally, however, the author of a volume may include merge questions (~P) in the assembly phase question list. The most common reason for doing this is to get an answer that will be used in the text of a subsequent question. For example, What is the name of the Petitioner? ANSWER: Jane Doe, and then How many children does Jane Doe have?. It is sometimes helpful to include the person's name in the text of a question and the only way to have that name available is to ask for it with a preceding question.

In volumes, which are subscription items, assembly questions are always contained in a separate database list. Assembly question tokens (~Axxxx) however, can be contained at the very top of a master form. If ProDoc finds an assembly question token at the beginning of a master form, it will ask that question during the assembly phase. This feature allows you, the user, to use our assembly questions in your own forms even though you do not have access to the assembly phase question list.

Here's how this feature can be very useful. Suppose you are creating a supplemental form in which you would like to use one of our volume codes (say ~I0001V) which inserts either him or her in the document. You can use this code and, if you have already produced a regular document which processes an assembly question asking if the plaintiff is male or female (say ~A1000V), then the insert code will work just fine.

On the other hand, if you have not previously created a document, which asked this question, then your supplemental form won't be able to determine which pronoun to insert. To solve this problem, you can insert the assembly question token at the very beginning of your supplemental form. When ProDoc processes the form, it will check to see whether the question has already been answered and, if not, it will ask the question.

THE MERGE PHASE

When ProDoc reaches the merge phase, it has created an intermediate form which is the same as the final assembled document except that it lacks fill in the blank information. ProDoc then asks the fill-in-the-blank questions to get the missing information.

You can select whether you want to see the intermediate form during the merge phase. Normally, users elect to have the intermediate form displayed as ProDoc jumps to each merge question and stops for the user to fill in the blanks. Some users, however, prefer to have ProDoc not show the form and instead simply pop up the questions as the tokens are found.

After all of the blanks are filled in, the document is completed and ProDoc stores it on disk in the directory selected by you.

MISCELLANEOUS CONSIDERATIONS

For technical reasons, ProDoc has been designed to process ASCII, WordPerfect® 5.x or WordPerfect 6.x

text files only. That means that if you edit a master form or create a supplemental form and save as a Microsoft Word file, ProDoc will have to convert it to a WordPerfect file before processing. ProDoc performs this conversion automatically without the user even knowing it has happened. This process works very reliably but it does take a few seconds each time the conversion is performed. Therefore, if speed is important to you, you would do better to save the master form or supplemental form as a WordPerfect 5.x or 6.x type file.

Formatting master forms (templates) - (~F tokens)

Formatting a master form to work consistently can be problematic. Consider a situation where you normally use 1" margins with line spacing of 1.5. In one form, you need to indent a section to 2" margins with line spacing set to 1. At the end of that indented section, you reset margins to 1" and line spacing to 1.5.

When ProDoc begins processing a master form, it memorizes the formatting settings that are in effect at the beginning of the form. Whenever ProDoc encounters a formatting token, it inserts the original setting into the document at that location. Just think of this as a way to restore the original formatting settings, whatever they are. In the example above, instead of putting the 1" margin and 1.5 line spacing settings in the master form, type in ~FLNSPV~FLMARV~FRMARV to reset line spacing and margins to the original setting.

ProDoc's formatting tokens are:

FLNSPV - line spacing
FLMARV - left margin
FRMARV - right margin
FTMARV - top margin
FBMARV - bottom margin
FFONT - font
FJUST - justification

Paragraph Numbering

Volumes purchased from Thomson Reuters do not use WordPerfect's or Microsoft Word's auto numbering capabilities. This is because our forms are used with a wide variety of word processors and auto-numbering codes simply don't convert between the different formats very reliably. Instead, ProDoc uses its own auto numbering mechanism. Our auto numbering tokens begin with ~N as follows:

~NRxxx - number with roman numerals (I, II, III, etc
~NAxxx - number with arabic numbers (1, 2, 3 etc.)
~NCxxx - use capital letters (A, B, C, etc.)
~NLxxx - use lower case letters (a, b, c)

Dimensioned Questions

In early versions of ProDoc, we couldn't simply ask, "How many children are there?" and then loop through and ask for the names for however many children were indicated. Instead, what we had to do is give the user a choice between a limited range such as 0, 1, 2, 3 or 4 children. We would then create separate objects for child 1, child 2, child 3 and child 4. Beginning with version 2.0, however, we now have what are called dimensioned objects, which can hold multiple answers. (For you programmers, these are arrays.) In the above example, we could use a single dimensioned object to hold the names of all the children. The benefit to this method is that we no longer have to limit the number of children to a preset maximum such as 4.

To use a dimensioned object, it must be placed in a loop structure. Loop structures begin with an L token, end with an ELOOP token, and may contain text and tokens in between. The L token is tied to an assembly phase token that indicates how many times the loop should repeat. For example, if the user says there are 5 children, then the loop would repeat five times, asking for the names of the first child, second child, third child, fourth child and fifth child.

A loop structure like the one below could be used to list the names and birth dates of several children in a document. In this example P1508V and P1514V are dimensioned objects that ask for and store the names and birth dates, respectively, of multiple children. L1500V is tied to an assembly phase token that asks how many children there are. Generally the assembly phase token is a token with the same number as the L token. In this case that would be A1500V.

~L1500V
Name of the Child: ~P1508V
Date of Birth: ~P1514V
~EL00PV

The questions asked in this example would be as follows. First would be the A1500V question, which might be "Number of children affected by the suit:". Assume the user answers "2". Next would be "Name of the 1st child:" (assume the answer is "Ann", then "Birth date of Ann:" (assume the answer is "January 1, 1991"), then "Name of 2nd child:" (assume the answer is "Bob"), then "Birth date of Bob:" (assume the answer is "February 2, 1992"). The text appearing in the assembled form for the loop structure for these answers would be as follows.

Name of child: Ann
Date of Birth: January 1, 1991

Name of the child: Bob
Date of Birth: February 2, 1992

In the bulk of the Family Law forms, only one petitioner is possible, but a dimensioned object, P1208G, is used to hold the name of the petitioner. If ~P1208G appears in a form, it must be in a loop structure even though there will be only one petitioner. There are no exceptions to the rule that a token in a form for a dimensioned object must be in a loop structure. The L token for the number of petitioners is L1200G. So, to insert the petitioner's name in a form using P1208G, use the loop structure ~L1200G~P1208G~EL00PG rather than ~P1208G.

SAMPLE ASSEMBLY SESSION

Assembly Questions

The first step in an assembly session is to ask a series of questions and perform calculations necessary to do the initial cutting and pasting which creates the form. The tokens for these questions and calculations are contained in a list, which is stored in a database file. A sample list is reproduced below:

C0001G - calculator that transfers client's name from Client/Case Manager

P9005G - Question: County where the action is pending. (Some counties have local requirements)

A0100V - Question: Describe your client:

A1200G - Question: How many petitioners are there:

L1200G - loop once for each petitioner

CPETIV - calculator that transfers client data from Client/Case Manager

P1208G - Question: Petitioner's full name:

P1240G - Question: Petitioner's birth date:
A8605V - Question: Describe the Petitioner:
ELOOPG - end of loop
A1300G - Question: How many respondents are there:
L1300G - loop once for each respondent
CRESPV - calculator which transfers client data from the contact manager
P1308G - Question: Respondent's full name:
P1340G - Question: Respondent's date of birth:
A8610V - Question: Describe the respondent:
ELOOPG - end of loop
A1500V - Question: Number of children affected by this suit:
L1500V - loop once for each child
P1508V - Question: Name of the [1st, 2nd, 3rd...] child:
P1514V - Question: Birth date of the child:
ELOOPV - end of loop
A2000V - Question: Select a domicile provision:
A2005V - Question: Select type of Service for Original Petition:

This is only a partial reproduction of the assembly question list for the Original Petition for Divorce. There are many more items in the complete list.

ProDoc works through this list and processes the tokens just as if they were found in the master form. Notice question A1200G, which asks how many petitioners there are. This question has logic attached to which automatically assigns "1" as the answer when you are creating divorce documents because there can only be one petitioner in a divorce. The question must be in the list, however, because the answer to this question determines how many times to process the following loop.

Assembling the Form

After the assembly phase question list has been processed, ProDoc begins processing the master form. This task involves scanning the form looking for assembly phase tokens. As each token is found, it is processed, which causes ProDoc to cut or paste text into the form. When this cutting and pasting is completed, ProDoc has created the form which contains all of the pronouns, paragraph numbers, clauses, paragraphs and provisions which are needed for the completed document. This intermediate form still contains fill-in-the-blank tokens, which will be processed, in order to fill in the blanks during the following merge phase. A sample page from a master form before the assembly phase and one from the form after the assembly phase is reproduced on the next pages:

This master form is filled with assembly and merge phase tokens:

~I0001V

~FLNSPV **Original Petition for Divorce ~FFONTV**

~FLNSPV~NA001V. Parties

~L1200GThis suit is brought by ~P1208G, Petitioner, who is ~P1241G (~M1204G) years of age and resides at ~P1215G, ~P1218G, ~P1222G.~ELOOPG ~L1300G~P1308G, Respondent, is

~P1341G (~M1304G) years of age and resides at ~P1315G, ~P1318G, ~P1322G.~ELOOPG

~NA001V. Domicile

~D2009V ~I2000V has been a domiciliary of Texas for the preceding six-month period and a resident of this county for the preceding ninety-day period.

~E2009V~D2000V Petitioner is domiciled in another state or nation. Respondent has been a domiciliary of Texas for at least the last six months and a resident of this county for the preceding ninety-day period.

~E2000V~NA001V. Service

~D2002V Process should be served on Respondent at ~L1300G~I2002V~ELOOPG.

~E2002V~D2004V No service on Respondent is necessary at this time.

~E2004V~D2006V Citation of Respondent by publication or other substituted service is necessary for the reasons stated in the attached affidavit.

~E2006V~D2012V~NA001V. Long-Arm Jurisdiction

~D2008V~D2014V Respondent is a nonresident of Texas. Petitioner is a resident or a domiciliary of Texas at the commencement of this suit. Texas is the last state in which marital residence between Petitioner and Respondent occurred, and this suit is commenced within two years after the date on which marital residence ended.

~E2014V~D2016V ~P2024V

~E2016V~E2008V~D2010V~D2018V The child~I2004V the subject of...

The form that follows is an example of an intermediate form in which all of the assembly phase tokens have been processed and the only remaining tokens will be processed in the merge phase. Notice that all of the unwanted clauses and paragraphs have been stripped out and paragraph numbers and pronouns have been inserted. This intermediate form is created internally by ProDoc and it is displayed to you while you are filling in the blanks during the assembly process.

NO. _____

IN THE MATTER OF	'	**IN THE DISTRICT COURT**
THE MARRIAGE OF	'	
	'	
[insert list of PETITIONERS]	'	**_____ JUDICIAL DISTRICT**
AND	'	
[insert list of RESPONDENTS]	'	**[insert county] COUNTY, TEXAS**

Original Petition for Divorce

1. Parties

This suit is brought by JOHN DOE, Petitioner, who is ~P1241G years of age and resides at ~P1215G, ~P1218G,~P1222G. JANE DOE, Respondent, is ~P1341G years of age and resides at ~P1315G,~P1318G,~P1322G.

2. Domicile

Petitioner has been a domiciliary of Texas for the preceding six-month period and a resident of this county for the preceding ninety-day period.

3. Service

Process should be served on Respondent at ~P1315G,~P1318G,~P1322G.

4. Protective Order Statement

No protective order under chapter 71 or section 3.581 of the Texas Family Code is in effect, and no application for a protective order is pending with regard to the parties to this suit.

5. Dates of Marriage and Separation

The parties were married on or about ~P2038V and ceased to live together as husband and wife on or about ~P2040V.

6. Grounds for Divorce

The marriage has become insupportable because of discord or conflict of personalities between Petitioner and Respondent that destroys the legitimate ends of the marriage relationship and prevents any reasonable expectation of reconciliation.

7. Children of the Marriage

There is no child born or adopted of this marriage, and none is expected.

8. Division of Community Property

Petitioner believes Petitioner and Respondent will enter into an agreement for the division of their estate. If such an agreement is made, Petitioner requests the Court to approve the agreement and divide their estate in a manner consistent with the agreement. If such an agreement is not made, Petitioner requests the Court to divide their estate in a manner that the Court deems just and right, as provided by law.

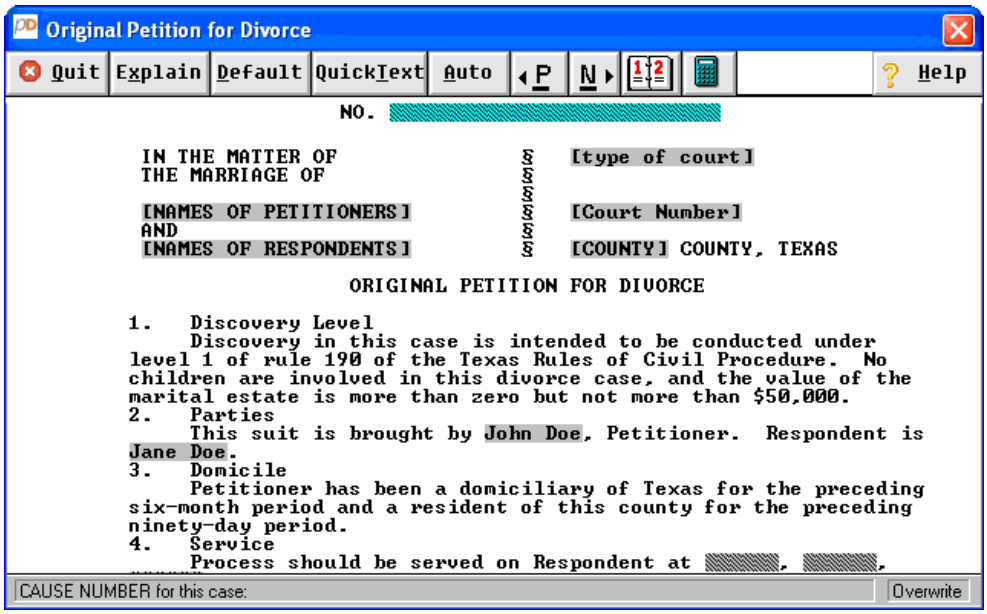
9. Statement on Alternative Dispute Resolution

Petitioner has signed a statement on alternative dispute resolution, which is attached as Exhibit ~P2072V.

10. Prayer

```
   Petitioner prays that citation and notice issue as required by law and that
the Court grant a divorce and all other relief requested in this petition.
```

An example follows of how this interim form appears during the merge phase:


Original Petition for Divorce
Quit
Explain
Default
QuickText
Auto
P
N
Help
NO.
IN THE MATTER OF
THE MARRIAGE OF
[NAMES OF PETITIONERS]
AND
[NAMES OF RESPONDENTS]
§ [type of court]
§
§
§ [Court Number]
§
§ [COUNTY] COUNTY, TEXAS
ORIGINAL PETITION FOR DIVORCE
1. Discovery Level
Discovery in this case is intended to be conducted under level 1 of rule 190 of the Texas Rules of Civil Procedure. No children are involved in this divorce case, and the value of the marital estate is more than zero but not more than $50,000.
2. Parties
This suit is brought by John Doe, Petitioner. Respondent is Jane Doe.
3. Domicile
Petitioner has been a domiciliary of Texas for the preceding six-month period and a resident of this county for the preceding ninety-day period.
4. Service
Process should be served on Respondent at
CAUSE NUMBER for this case:
Overwrite

ANALYSIS OF A MASTER FORM

The following is a reprint of the first page of a master form for a Notice of Hearing For Temporary Orders.

```
~I0001V


                  Notice of Hearing for Temporary Orders ~FFONTV


~FLNSPV  ~L1300GNotice is given to Respondent, ~P1308G~ELOOPG, and Respondent is
ORDERED to appear in person before this Court in the courthouse at ~P2450V,
Texas, on                                                  at
          m.

   ~D1500VThe child~I2004V the subject of this suit ~I2003V ~M1504V.

~E1500V~D2320V One of the purposes of the hearing is to determine whether the
temporary injunction prayed for should be granted to enjoin Respondent from the
following:

~E2320V~D2322V~D2260V   ~NA001V. Communicating with Petitioner in person, by
telephone, or in writing in vulgar, profane, obscene, or indecent language or in
a coarse or offensive manner.

~E2260V~D2262V ~NA001V. Threatening Petitioner in person, by telephone, or in
writing to take unlawful action against any person.
```

```
~E2262V~D2264V ~NA001V. Placing one or more telephone calls, anonymously, at any
unreasonable hour, in an offensive and repetitious manner, or without a
legitimate purpose of communication.

~E2264V~D2268V ~NA001V. Causing bodily injury to Petitioner~D1500V or to a child
of either party~E1500V.

~E2268V~D2270V ~NA001V. Threatening Petitioner~D1500V or a child of either
party~E1500V with imminent bodily injury.

~E2270V~D2272V ~NA001V. Destroying, removing, concealing, encumbering,
transferring, or otherwise harming or reducing the...
```

Here's what the highlighted objects mean:

~I0001V - this is an assembly insert code which inserts the appropriate caption, depending on how many children are in the case (~A1500V);

~FLNSPV - the caption is single-spaced and then the form resets line spacing to "2". If the user set line spacing to something different in the format option in ProDoc, then this code will override the double spacing with whatever the user set;

~L1300G - this global loop loops one time for each Respondent. It has logic which presets the count to "1" when the user is preparing Family Law documents;

~P1308G - this global merge question asks for the name of each Respondent. Since the loop it is in (L1300G) is preset to "1" for family law, the user will only be asked for the name of one Respondent;

~ELOOPG - this end loop token signifies the end of the loop for the respondent's name;

~D1500V - this delete object deletes the following paragraph if there are no children in the case. (~A1500V);

~I2004V - this assembly insert code inserts "ren" if there are more than one child in the case;

~I2003V - this assembly insert code inserts "are" or "is", depending on how many children are in the case;

~M1504V - this merge insert object inserts the name(s) of the child(ren) into the document in a formatted list. A formatted list means, if there are more than one child, there is a comma between each name and an "and" before the last name;

~E1500V - this end delete token marks the point to quit deleting if there are no children;

~NA001V - these numbering tokens will sequentially number each of the paragraphs in the completed document.

Appendix C - Timeslips Extension

Overview

The Timeslips extension gives you the ability to bill your clients by generating "slips" for each document created in ProDoc. Generating a slip takes place after document assembly in ProDoc and before the document is opened in the word processor.

You must install Timeslips version 9.1 (or newer) in order to implement this extension.

ProDoc's database files must first be synchronized with Timeslips' database files. Synchronization ensures that changes made in one program's database are replicated in the other program's database. There are many ways in which the synchronizer can be used:

- If you are a new Timeslips user and a current ProDoc user with Client and Case information, the Synchronizer will automatically export all the records into Timeslips. Conversely, if you are a new ProDoc user and a current Timeslips user, the Synchronizer will export all clients and projects into ProDoc.
- You can set the Timeslips extension to keep both databases synchronized automatically or manually.
- You can individually select, in either Timeslips or ProDoc, which records to synchronize.
- After the first step is completed, you can set the Synchronizer to display only new records which have not been previously synchronized. This gives you the opportunity to decide later whether or not you want to synchronize the records.

It is important that you read this appendix thoroughly before proceeding to integrate ProDoc and Timeslips.

Step 1: Setting up ProDoc before synchronization

There are some specific requirements in the synchronization with Timeslips, which you will need to satisfy before synchronizing.

1. From the Main Menu, click **Customize > Options**, then click the **Timeslips** link on the left side of the options and settings window. See the **Timeslips Settings** 72 section of this manual for a view of the screen.
   a. Select the box labeled **Enable the Timeslips Connection.**
   b. If desired, click the **On** radio button to have the synchronizer start each time you run ProDoc. If you do this, ProDoc will attempt to connect with Timeslips in subsequent program starts. If you select **Off,** you will need to use the **Tools** menu to manually start the synchronization process.
   c. You will now have a new menu option under the **Tools** menu, titled **Timeslips**, which branches to **Timeslips setup, Timeslips synchronizer,** and **Timeslips task manager**. You will use these menu items while managing ProDoc and Timeslips interactions.
2. We recommend that you assign **Client IDs** and **Case IDs** in order to simplify the synchronization.
   a. First, set up ProDoc to use unique Client and Case IDs. From the Main Menu, click **Customize > Options,** then click the **Clients & Cases** link at the left of the window. Ensure both boxes on this window are selected. See the **Client & Case Settings** 73 section of this manual for help with this process. Each client record and project record in Timeslips contains a field called Nickname1. These fields are required and must contain a unique value. The ProDoc "Client ID" field and "Case ID" fields are the fields which must match the "NickName1" fields in Timeslips.
   b. Next, if you haven't already assigned IDs to your cases and clients, use the **Client & Case Manager** 32 to enter Client IDs and Case IDs for each client and case in your database.
   c. Exit ProDoc and proceed to Step 2.

Why use Client and Case IDs? If you are using Client IDs and Case IDs in ProDoc, then the

synchronizer will use those fields to fill in the Timeslips NickName1. If these fields are vacant in ProDoc, the synchronizer will attempt to "intelligently" fill in those fields in BOTH programs using your client's initials.

You should not rely too much on this convention, as Timeslips does not allow for duplicated NickName1 and you may very well have another client with identical initials. For this reason, if you are not using Client IDs and/or Case IDs in ProDoc, you should be sure to set up auto formatting for Nickname1 in Timeslips and that scheme will then be used when you synchronize clients. Better yet, take the time to go into the Client & Case Manager and assign client and case IDs to everyone. Timeslips limits its Nickname1 field to 30 characters or less. When setting up Client IDs and Case IDs in ProDoc, make sure to keep them under 30 characters long when combined.

If, after synchronization, you find ProDoc records marked as not synchronized, chances are there is another record already in Timeslips with the same Nickname1.

NOTE: If you have the same case code for two different clients, it will work with Timeslips provided the client nickname is different. For example, if you use 1999/3/16-Divorce to refer to Smith' s divorce and 1999/3/16-Divorce to refer to John' s divorce, it will be inserted in Timeslips as Smith!1999/3/16 and John!1999/3/16.

Once synchronization is completed, updating names, addresses and related information in one program will update the same information in other programs' data files. Initially, these options are set to automatically synchronize.

Step 2: Setting up Timeslips before synchronization

To work properly with ProDoc, some methods that are allowed in Timeslips should be avoided to keep the two databases as compatible as possible. This appendix details those specific points that you should check. If you are an existing Timeslips user, you may need to make some changes in your database to avoid more work once both products are synchronized.

Timeslips offers three billing system possibilities: per Client, per User, and per Task. ProDoc works only with the "per Task" billing system on a flat rate. If you have currently defined a billing rate for your Clients and Timekeepers, you can still use these for all jobs not related to ProDoc. However, in order to bill from ProDoc, you will need to define tasks that will be used by ProDoc to generate slips.

New Timeslips user

If you have been using ProDoc and recently installed Timeslips, carefully read your Timeslips software manual before attempting to initiate the synchronization process. In particular it is important that you understand the concept of "Templates" and "New Name" defaults as defined in the Timeslips Version 9.1 or later manual. These allow you to define options for billing your clients and other important settings.

When ProDoc exports clients into Timeslips, it uses the appropriate template if one exists. If there is no template, then the imported client will reflect the default settings in Timeslips. Clearly it would be better to have new Timeslips clients set up the way you want them rather than relying on the Timeslips default settings. Likewise, if your firm uses a specific coding scheme for client id's, you will want to set this up in Timeslips before you import clients from ProDoc.

NOTE: See Nickname Formatting in your Timeslips software manual for more information.

You should familiarize yourself with Timeslips and then define how you want to bill your clients. To save time, use Timeslips templates whenever possible. **You must perform the following two steps before using Timeslips and ProDoc together:**

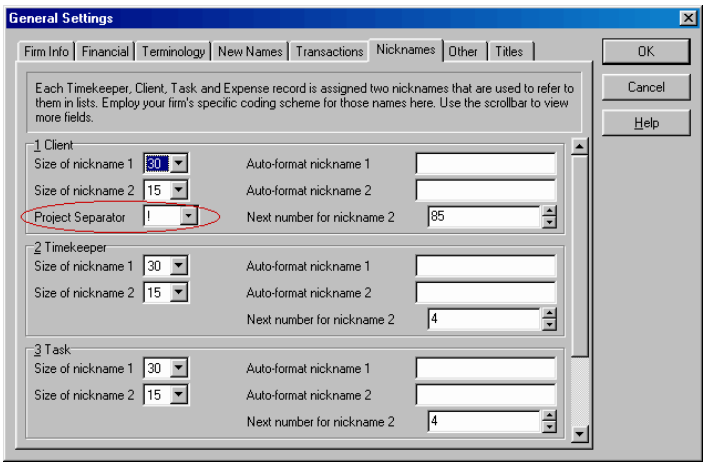


Figure C-1, Timeslips General Settings Window

1. **Define a "project" separator.** "Project" is the Timeslips term that ProDoc will refer to as "Cases". Access this option from the Timeslips Setup menu. Click the **General** item and then click on the **Nicknames** tab. A window similar to Figure C-1 appears.

2. **Define a "Default" Task** to be used by ProDoc when no Task has been assigned to a form. You may want to define more tasks, but the "Default" is needed to begin generating slips from ProDoc. You define tasks by going to **Timeslips Navigator**, clicking **Tasks** and then selecting **New Task.**

During initial synchronization, you will select the default task that you've set up in Timeslips and enter a default charge for the task. This is needed in the beginning, and it can be changed while generating slips.

Existing Timeslips Users

If you have been using Timeslips and recently installed ProDoc, there are a few items that you need to consider in Timeslips. In particular:

- Timeslips allows you to combine both client and project information into a single master record (i.e., Jones/Divorce),
- Or, you can have one master record (i.e., Jones), which stores client information, and separate records for each project (i.e., Divorce or Bankruptcy, etc.)

ProDoc can only synchronize records when there is a separate master record for each client with separate records for each project (Option B).

Therefore, if you have combined client and project information into a single master record, you will have to modify your database before attempting to synchronize the databases. To modify your database, you must add a record to store the client alone, check the master checkbox for this record and then uncheck the master mark for the client/project record. This is the only way to ensure that your Timeslips records will be properly synchronized with ProDoc.

ProDoc assumes that the "master" record stores only the client information and has no project separator character in the NickName1 field. The "child" records (cases) are the only ones to have this character. Double check your database to ensure that is correct if you want to have a smooth synchronization process.

You will also want to check that EVERY "client/case" record has a full name in your database before exporting your records to ProDoc and synchronizing. If this field is blank, the record will NOT be imported in ProDoc. If necessary, you can correct this later, although these Timeslips records will be marked as not synchronized.

Step 3: Start ProDoc and run the Timeslips Synchronizer Settings Wizard

Setup options for synchronizing the databases are primarily established from within ProDoc. These options include either automatic or manual processing of data, frequency, and timing. You can run the synchronizer settings wizard from the Main Menu by clicking **Tools > Timeslips > Timeslips setup**. This action will initiate five wizard settings windows similar to Figures C-2 through C-6.

Important Note: If this is the first time you are running the Synchronization Wizard, the default settings should normally be used.

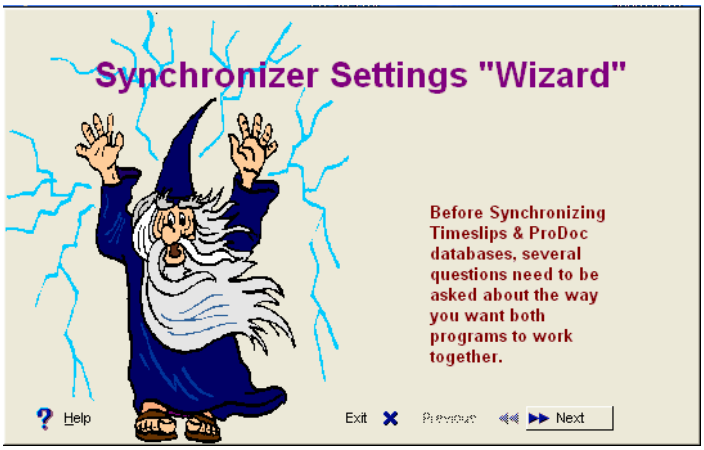

Synchronizer Settings "Wizard"
Before Synchronizing Timeslips & ProDoc databases, several questions need to be asked about the way you want both programs to work together.
Help
Exit
Next

Figure C-2, Synchronizer Settings Window 1

The first settings window informs you that several questions need to be asked about how you want ProDoc and Timeslips to work together.

This window sets the stage for the four remaining settings windows.

Click **Next**.

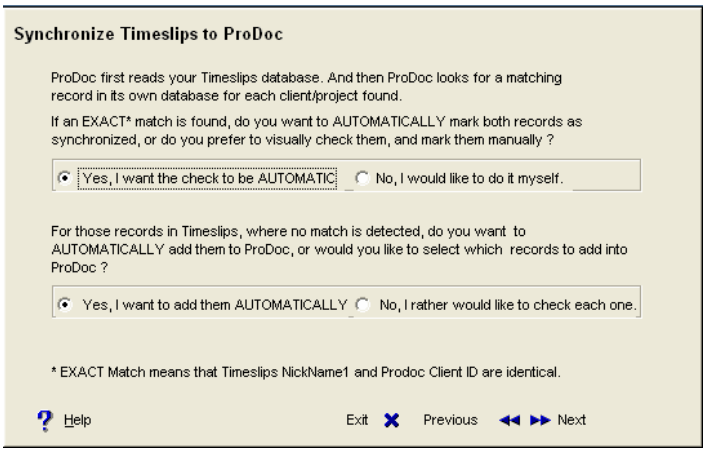

Synchronize Timeslips to ProDoc
ProDoc first reads your Timeslips database. And then ProDoc looks for a matching record in its own database for each client/project found.
If an EXACT* match is found, do you want to AUTOMATICALLY mark both records as synchronized, or do you prefer to visually check them, and mark them manually ?
Yes, I want the check to be AUTOMATIC
No, I would like to do it myself.
For those records in Timeslips, where no match is detected, do you want to AUTOMATICALLY add them to ProDoc, or would you like to select which records to add into ProDoc ?
Yes, I want to add them AUTOMATICALLY
No, I rather would like to check each one.
* EXACT Match means that Timeslips NickName1 and Prodoc Client ID are identical.
Help
Exit
Previous
Next

Figure C-3, Synchronizer Settings Window 2

The first option here applies only to those who already have databases in both ProDoc and Timeslips. It lets you check the status of a record before it is synchronized.

The second option is to add records in ProDoc. Be aware that if you answer **No** to both questions, and press the **Begin** button on the synchronizer window, you will have to synchronize all your records by dragging and dropping each of them. For now, if you are synchronizing for the first time, accept the default settings and click **Next** to continue.

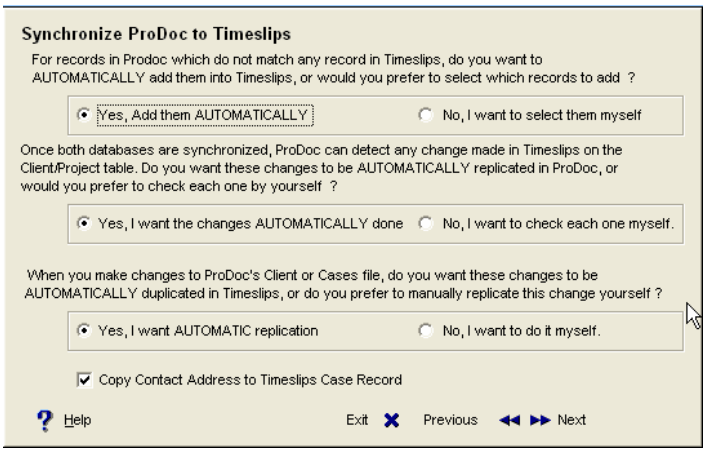

Synchronize ProDoc to Timeslips
For records in Prodoc which do not match any record in Timeslips, do you want to AUTOMATICALLY add them into Timeslips, or would you prefer to select which records to add ?
Yes, Add them AUTOMATICALLY
No, I want to select them myself
Once both databases are synchronized, ProDoc can detect any change made in Timeslips on the Client/Project table. Do you want these changes to be AUTOMATICALLY replicated in ProDoc, or would you prefer to check each one by yourself ?
Yes, I want the changes AUTOMATICALLY done
No, I want to check each one myself.
When you make changes to ProDoc's Client or Cases file, do you want these changes to be AUTOMATICALLY duplicated in Timeslips, or do you prefer to manually replicate this change yourself ?
Yes, I want AUTOMATIC replication
No, I want to do it myself.
Copy Contact Address to Timeslips Case Record
Help
Exit
Previous
Next

Figure C-4, Synchronizer Settings Window 3

For the first choice, if you are importing from ProDoc to Timeslips and answer **No** here, nothing will happen when you press the **Begin** button. You will have to drag and drop each record.

The two other choices affect daily usage after initial synchronization. Answering **No** here will disable the automatic processing, and you will need to use the synchronizer. Again, when initially synchronizing, accept the default selections and click **Next**.

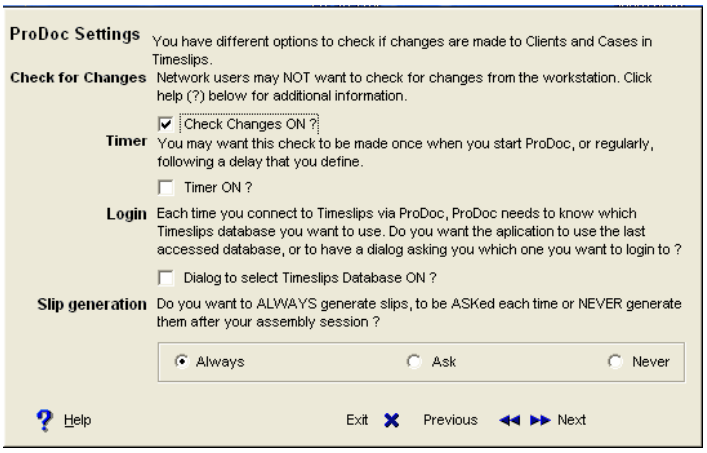

ProDoc Settings
You have different options to check if changes are made to Clients and Cases in Timeslips.
Check for Changes
Network users may NOT want to check for changes from the workstation. Click help (?) below for additional information.
Check Changes ON ?
Timer
You may want this check to be made once when you start ProDoc, or regularly, following a delay that you define.
Timer ON ?
Login
Each time you connect to Timeslips via ProDoc, ProDoc needs to know which Timeslips database you want to use. Do you want the aplication to use the last accessed database, or to have a dialog asking you which one you want to login to ?
Dialog to select Timeslips Database ON ?
Slip generation
Do you want to ALWAYS generate slips, to be ASKed each time or NEVER generate them after your assembly session ?
Always
Ask
Never
Help
Exit
Previous
Next

Figure C-5, Synchronizer Settings Window 4

This window will modify how ProDoc handles changes that are made in Timeslips. A computer running ProDoc can be set to automatically check for changes made in Timeslips every few minutes or once each time you start ProDoc.

In a networked environment, it would be most efficient to have only one workstation checking for changes in the Timeslips database. Since these settings are per workstation, we recommend that this checkbox only be set "ON" at one workstation on the network. The workstation which checks for changes should be one which is used every day. If you uncheck this box, choices for the timer settings will disappear.

If you uncheck **Timer ON?**, changes made to your Client/Cases database in Timeslips would only be checked when you start ProDoc. This choice would be very logical if you are on a stand-alone computer and you are the one making the changes.

If the timer is on, you can set the frequency that checks are to be made. By default, it is 1 minute, but you may prefer to have ProDoc checking for changes in Timeslips less frequently. To increase the time between checks, just increase the value in the timer delay field.

Moreover, if the timer is set to **ON** and you have other applications open such as your word processor, every time the check is made screen focus will unexpectedly return to ProDoc. If this proves bothersome for you, you may want to not check it **ON**.

In Timeslips, you can have multiple databases. Most law offices will probably not use this feature and therefore do not want to specify which Timeslips database to use every time they start ProDoc. If you check the box labeled **Dialog to select Timeslips database ON?,** you will be presented with a window each time you start ProDoc which will ask which Timeslips database you want to use. The default is unchecked. You should leave it unchecked if you only have one database set up in Timeslips. It is logical to assume that you want to use the same database as you used the previous time.

The last choice concerns slips generation after you generate documents for a case. By default, it is set to always generate a slip. You can change the default setting to be asked each time or you can set it to never generate a slip. Keep in mind that even if you set this to always generate a slip, you will still always be able to cancel or edit the slip before ProDoc sends it to Timeslips. Again, accept the default settings and click **Next** if you are synchronizing for the first time.

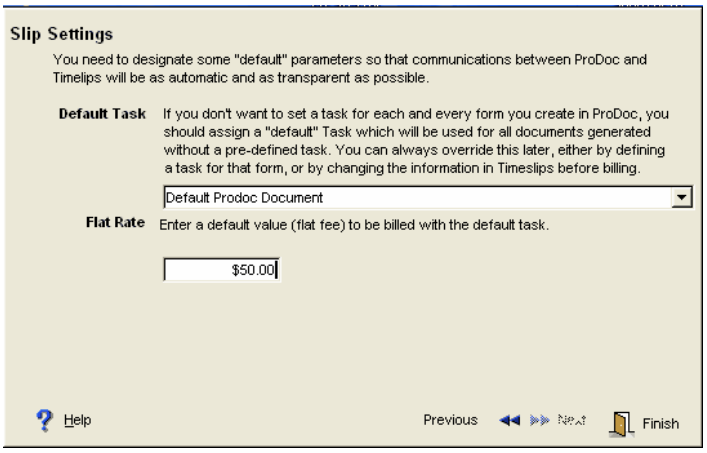

Slip Settings
You need to designate some "default" parameters so that communications between ProDoc and Timelips will be as automatic and as transparent as possible.
Default Task
If you don't want to set a task for each and every form you create in ProDoc, you should assign a "default" Task which will be used for all documents generated without a pre-defined task. You can always override this later, either by defining a task for that form, or by changing the information in Timeslips before billing.
Default Prodoc Document
Flat Rate
Enter a default value (flat fee) to be billed with the default task.
$50.00
Help
Previous
Next
Finish

Figure C-6, Synchronizer Settings Window 5

The last settings window allows you to select which Timeslips task will be your "default" task. All documents generated from ProDoc without an "assigned" task will generate a Slip using this default task. In order to select a default task here, your Timeslips installation must have the task set up and active.

ProDoc will use the value you specify here instead of any rate you place on the default task when setting it up in Timeslips.

Regardless of any default values you enter here, you will be able to cancel or edit any slip before ProDoc sends it to Timeslips. If you are synchronizing for the first time, accept the default settings and click Finish.

Step 4: Start the Synchronization process

Depending on your particular circumstances, one of the following scenarios probably applies to you:

- If you are already a Timeslips user and just acquired ProDoc to assemble your legal documents, read the section below called "From Timeslips to ProDoc".
- If you are a ProDoc user and just installed Timeslips, you will want to read about "From ProDoc to Timeslips".
- If you were already using both products, but with a previous version where the synchronization between the two was not available, read about "Both Together".

NOTE: This distinction is valid only for your first use. Once both databases are synchronized, the process will be the same, whatever "history" you have.

After you have complied with the prerequisites discussed above, ProDoc and Timeslips will be properly configured. You can now begin the synchronization process. To start the synchronization process, open ProDoc and click **Tools > Timeslips >Timeslips synchronizer**. A window similar to Figure C-7 will appear.

NOTE: If you don't see this option in your Tools menu, there is a problem with your Timeslips installation, and ProDoc cannot find it.

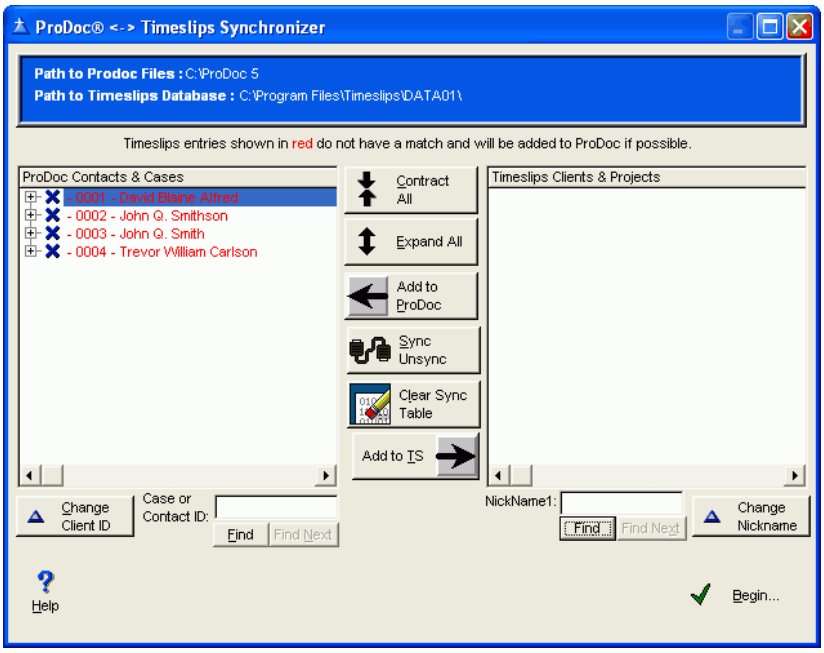


Figure C-7, Synchronization Window

The Synchronizer window will be different depending on which application is the new one for you.

NOTE: Before the synchronization, when you run ProDoc, you may see an error message stating "There are no records to Process". This is because each time you run ProDoc, it will build a table with matching records in ProDoc and Timeslips.

From ProDoc to Timeslips

As a new Timeslips user running the synchronizer for the first time, you should see something like the window shown in Figure C-7.

The list on the left side is your ProDoc contact file, and linked to each client are the case(s) for that client. This type of display is called a tree. To see the cases for each client, just click the + sign to expand that branch of the tree.

The blue cross icon means that this record is not yet synchronized.

The buttons in the center of the window are usually not used in initial synchronization. These are used in later sessions. Click on the Help icon in the lower left portion of the window to see full details on these buttons.

To launch the export/synchronization process itself, click the **Begin** button in the lower right hand corner of the window. While the synchronization is in process, the name of your client/case being synchronized is displayed on the bottom of the screen. Be patient as this process could be quite lengthy depending on your computer's performance and how many clients/cases you have in the database.

After synchronization is completed and both databases are fully synchronized, all records should now have a green checkmark icon meaning that the record is synchronized.

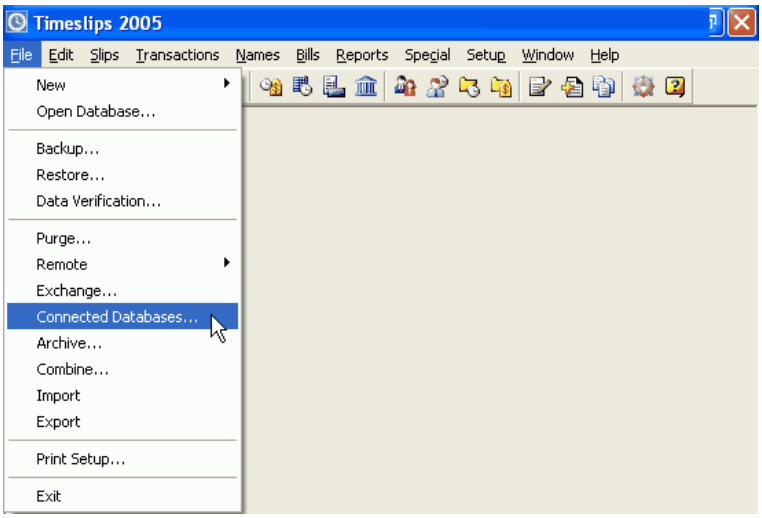


Figure C-8, Selecting Timeslips Connected Databases

To check the current state of synchronization, open Timeslips and click **File > Connected Databases**. select the menu item Special from the main screen. Then, click on Connected Databases from the drop down window as shown in Figure C-8.

NOTE: You will notice that ProDoc has been added as the last item on this menu, which allows you to run ProDoc from Timeslips.

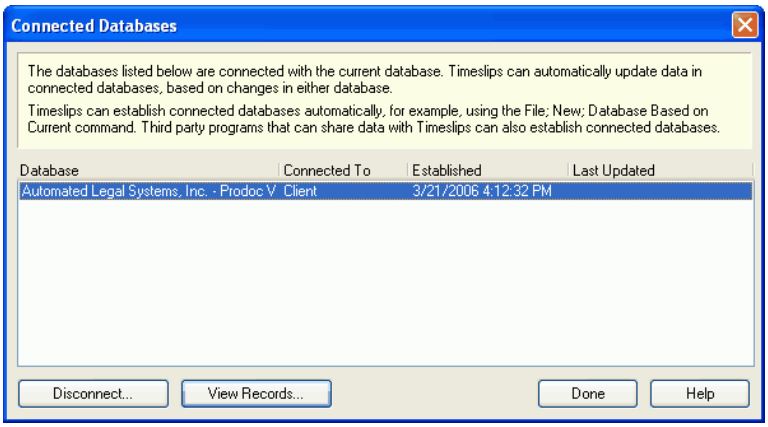

Connected Databases
The databases listed below are connected with the current database. Timeslips can automatically update data in connected databases, based on changes in either database.
Timeslips can establish connected databases automatically, for example, using the File; New; Database Based on Current command. Third party programs that can share data with Timeslips can also establish connected databases.
Database
Connected To
Established
Last Updated
Automated Legal Systems, Inc. - Prodoc V
Client
3/21/2006 4:12:32 PM
Disconnect...
View Records...
Done
Help

Figure C-9, Connected Databases Window

You should then see something like the window in Figure C-9, which confirms that both applications are properly linked together.

You can click on the **View Records** button to see a list of all your Timeslips clients/cases records, with a **Yes** displayed in the Connected column. If you are not sure about synchronization for one particular record, this is the place to look.

From Timeslips to ProDoc

If you are a new ProDoc user, the only real difference is that the empty list will be on the left side in Figure C-7 with your Clients/Cases relation tree on the right side. Click on the "begin" button, and watch your records being converted/synchronized into ProDoc.

Both together

If you were using both applications before the synchronization was available, you should refer to BOTH "existing" Timeslips user above, and "existing" ProDoc user above, as the synchronization process will attempt to match records from ProDoc client IDs and case IDs with Timeslips NickName1. If those fields for clients and cases are different in each program, the process may create two entries in each program for each client and each case.

> **Note:** ProDoc exports phone numbers to Timeslips using a predefined scheme. On the other hand, if a phone number change is detected in Timeslips, there is no reliable way to determine which phone number changed or if a new number was added. The synchronizer process will systematically add the numbers for the contact into ProDoc using the order they are stored in Timeslips. So, if you wind up with several "home" numbers in ProDoc, it may be because you changed a phone number in Timeslips and the number was then incorrectly added to ProDoc during synchronization. In short, once the two databases are synchronized, **it is more efficient to add clients and cases or make changes in ProDoc rather than in Timeslips.**

Daily ProDoc use with synchronization

Each time you run ProDoc, you will briefly see a small information window telling you that ProDoc is connecting to Timeslips. ProDoc is reading the synchronization tables to store them in memory so that changes made in one or the other database can be replicated in the matching record.

Should you want to change the default settings used in the initial synchronization, you can do so by selecting **Tools > Timeslips > Timeslips setup** from the ProDoc menu. This will bring up the same series of five windows previously described. Use this procedure to customize the way subsequent synchronizations will work. You should become familiar with the options described for each of the five windows before beginning to work with both applications linked together.

Add or make changes to clients and cases in ProDoc

Now that the synchronization is operational and the settings are acceptable, you will want to know what happens if you change, add or delete a client and/or a case in ProDoc.

If you have not changed the settings, the routine synchronization with Timeslips will be completely transparent. Therefore, when you select a client in ProDoc and change the name, address, or even the Client-ID and click OK, you will find these changes reflected to the same client in Timeslips. You can do the same for a case, or add a new case.

If you have changed your settings so that the synchronization is not automatic, you will not see the changes in Timeslips immediately. In this case, you will need to run the Synchronizer and use it to synchronize any changed records by using the buttons in the center of the window or with drag and drop. **Important note: If you delete a client and/or a case in ProDoc, these will NOT be deleted in Timeslips.**

Add or make changes to clients and cases in Timeslips

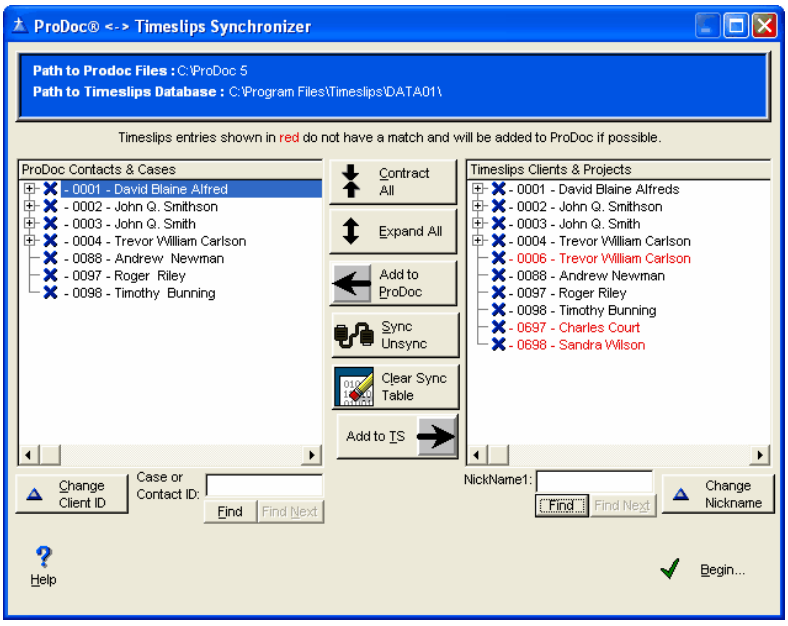
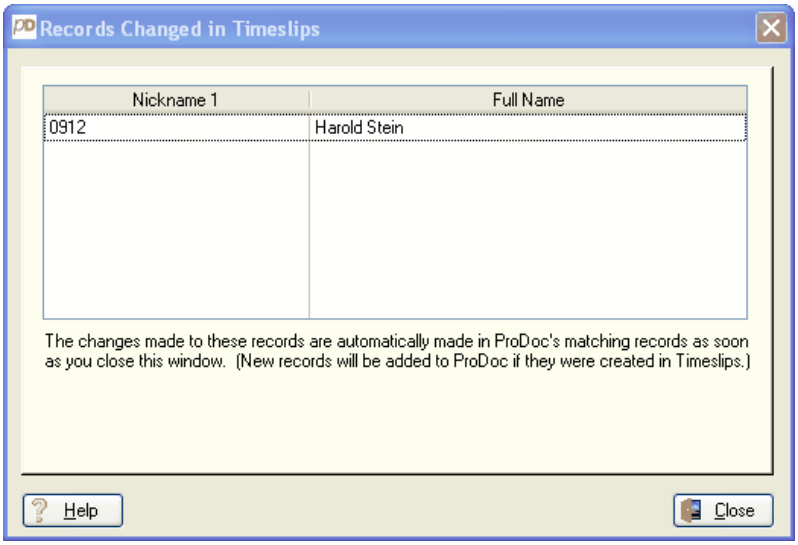

ProDoc® <-> Timeslips Synchronizer
Path to Prodoc Files : C:\ProDoc 5
Path to Timeslips Database : C:\Program Files\Timeslips\DATA01\
Timeslips entries shown in red do not have a match and will be added to ProDoc if possible.
ProDoc Contacts & Cases
- 0001 - David Blaine Alfred
- 0002 - John Q. Smithson
- 0003 - John Q. Smith
- 0004 - Trevor William Carlson
- 0088 - Andrew Newman
- 0097 - Roger Riley
- 0098 - Timothy Bunning
Contract All
Expand All
Add to ProDoc
Sync Unsync
Clear Sync Table
Add to TS
Timeslips Clients & Projects
- 0001 - David Blaine Alfreds
- 0002 - John Q. Smithson
- 0003 - John Q. Smith
- 0004 - Trevor William Carlson
- 0006 - Trevor William Carlson
- 0088 - Andrew Newman
- 0097 - Roger Riley
- 0098 - Timothy Bunning
- 0697 - Charles Court
- 0698 - Sandra Wilson
Change Client ID
Case or Contact ID:
Find
Find Next
NickName1:
Find
Find Next
Change Nickname
Help
Begin...

Figure C-10, Synchronization Window

When you add or change a Client and/or a case in Timeslips , that change will be reflected differently in ProDoc depending on your settings. If **Check Changes ON** is not checked, you have disabled ProDoc's mechanism for automatically detecting changes made in Timeslips.

If you have disabled automatic checking, the only way to see if changes have been made and to import them is to run the Synchronizer from ProDoc's **Tools** menu. Figure C-10 shows some Timeslips records listed in red color that were added to Timeslips and have not yet been synchronized.

If you left your settings to have the synchronizer operate automatically, you will see a window like Figure C-11 each time you run ProDoc. If you elected in setup to check every few minutes, you will see it every time an automatic check finds records which need to be synchronized.


Records Changed in Timeslips
Nickname 1
Full Name
0912
Harold Stein
The changes made to these records are automatically made in ProDoc's matching records as soon as you close this window. (New records will be added to ProDoc if they were created in Timeslips.)
Help
Close

When the synchronizer adds or changes a client in ProDoc, a window like the one in Figure C-11 will pop up to let you know about the change so that you are not surprised to discover new names in your client list.

Just click the **Close** button. The process is the same for adding new clients or changing existing client information.

Figure C-11, Records Changed in Timeslips

Defining tasks and assigning fees to tasks

The Task Manager lets you assign a pre-existing Timeslips task to either an individual ProDoc master form or to a form set. **You cannot create Timeslips tasks in ProDoc. You can only assign them from within ProDoc.** If you do not assign a task, ProDoc will use the pre-defined "Default" task. Assigning fees to a predefined task is done only in Timeslips. Modifying fees for a completed document can be done in ProDoc when you are generating the time slip. The tasks themselves are created in Timeslips. If you want to use a task for generating slips in ProDoc, you will need to "assign" the task to forms or form sets in ProDoc. You decide which rules to follow when you bill your clients for the work done in ProDoc.

You should initially create a task in Timeslips intended to be your "default" task. That means that anytime you generate a document in ProDoc for a case and you have not assigned a specific task for that form or form set, ProDoc will use information from the default task. You can always change or cancel this Slip before it is sent to Timeslips. Creating this default task is the best way to get accustomed to this feature. In due time, you will develop your own guidelines for which forms or form sets you want to create individual tasks for. When you define a task in Timeslips, it should be set as billable and the **rate type should be Flat** rather than hourly.

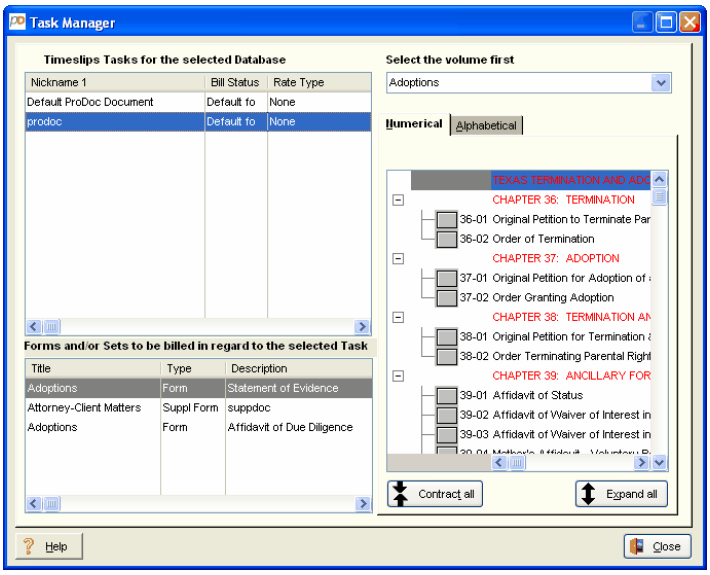


Figure C-12 shows the Task Manager, which is used to assign Timeslips tasks to specific forms or form sets. You access the Task Manager Wizard by clicking **Tools > Timeslips > Timeslips task manager** from the ProDoc menu.

Figure C-12, Task Manager Window

When you generate a form set which is covered by a Timeslips task, ProDoc will generate only one slip for that task instead of one slip for each document. It is a very simple operation to assign a form or form set to a task. First, select the desired task in the upper left list box. Then select the form on the right (after selecting the volume you want), and "drag" it (by holding your left mouse button down while you move the mouse cursor) to the list of assigned forms on the lower left side. Then drop it there, by releasing your mouse button. When you see the mouse cursor changing to a down arrow, it means that your "drop" will be valid. The first task shown above has no form assigned to it since it is the task which will always be used by default. If you don't assign forms to tasks here, you can still assign them on the fly after you generate the documents in ProDoc. After you find yourself assigning the same task and form over and over again as you generate slips in ProDoc, you will eventually see that it would be more efficient to come to this Task Manager and assign the task permanently.

Conversely, you might also want to create a series of tasks in Timeslips that are keyed to a dollar value such as "created a $25 ProDoc document". You would also have tasks for documents valued at $50, $75, etc. Then, you can assign them to each applicable form by dragging and dropping the form from the right hand pane to the bottom left pane in the task manager.

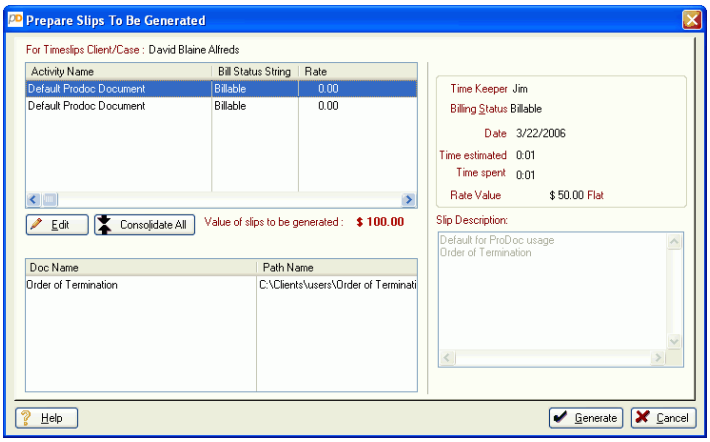
Generating Slips

Finally, you are ready to generate slips in ProDoc as you assemble documents for a case.

Generating slips is a seamless process in ProDoc. If you select a client and case at the beginning of the assembly session and that case is properly synchronized, ProDoc will generate a slip. When the slip is presented at the end of an assembly session, you can edit any significant information, like the "timekeeper", the dollar value, etc., before "sending" the slip to Timeslips.

You will still be able to edit the slip before billing the client in Timeslips.

Your settings on Window 4 of the setup wizard will affect how slips are generated. You may select to NOT generate slips, which could be useful if you are still making tests and you do not want your actual database to be affected by these tests. You can also select NOT if you have Timeslips but you don't yet want to use it from within ProDoc.



In any other case, you should see a window like the one in Figure C-13 when ProDoc is preparing to generate slips.

In this example, a document has just been generated for which no specific task has been assigned. As a result, the standard default task is used. You see in the upper left list box the slips to be generated, with the name of the task used, as well as the default value, and billing status.

Figure C-13, Prepare Slips to be Generated Window

In the lower left list box you see the title and filename of the document included in the slip, which is highlighted. Multiple documents would be listed if the slip were for a form set. In the text box on the lower right you will see the Slip description. By default, ProDoc will use a list of the documents generated as the description of the task.

If you click on the **Edit** button, you will see a window like the one shown in Figure C-14.

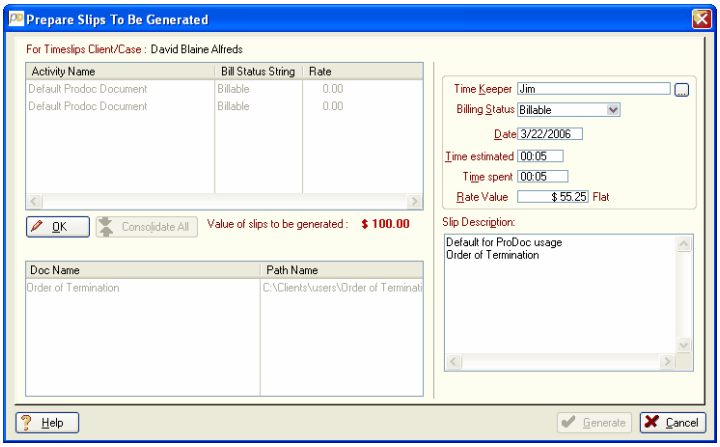


Figure C-14 illustrates what you see when you are in edit mode for the highlighted slip. The two list boxes on the left are disabled (grayed out), but you can edit all the fields on the right side. In this example, we have changed the value for this slip from $50.00 to $55.25

Clicking on the **OK** button will save your changes.

Figure C-14, Prepare Slips to be Generated Window

You may see a **Consolidate All** button. This command allows you create a single slip from all listed slips so that you will have only one slip for all of the generated documents. All of the listed tasks will be consolidated into the task, which is highlighted when you click the **Consolidate All** button.

If you have many different documents and different kind of tasks, you may wish to consolidate your slips, but not all together. To achieve this, simply drag the desired task and drop it on the "target" task. Doing that allows you to individually consolidate your slips rather than consolidating all of them. In the example on the previous page, either method would yield the same result.

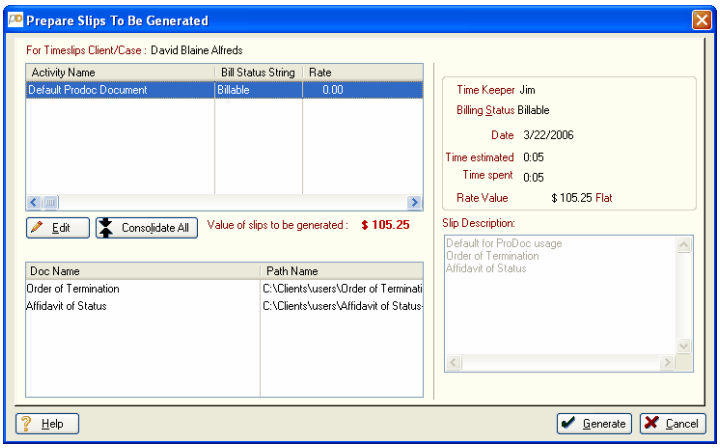


Figure C-15, Prepare Slips to be Generated Window

Figure C-15 shows what you get after saving your changes.

Now, clicking the **Generate** button will close the window and send the data to Timeslips.

NOTE: You may want to initially utilize the foregoing procedure to simply edit the dollar value of the default task for each document you generate.

Appendix D - Creating Supplemental Forms

Purpose

ProDoc contains a considerable number of volumes with thousands of professionally developed master forms. However, you may wish to add your own forms to ProDoc's volumes. Using ProDoc's supplemental forms feature, you can create documents to assemble in ProDoc from documents you are using in your practice. This section describes the process of creating supplemental forms.

NOTE: Appendix B 271 of this manual contains useful technical information regarding the process ProDoc uses to assemble documents. Also, feel free to call 800-759-5418 for assistance. Just ask to speak with a representative from our Technical Support department.

Process

Follow these steps when creating supplemental forms. First, create or open a document in your word processor. Next, print the document and highlight those items that represent variable information. In ProDoc, create tokens to represent the variable information needed in your document. Return to your word processor and insert the tokens into your document. Save the document to the correct ProDoc volume. Associate the document to the ProDoc database and test the form by assembling the document.

NOTE: The steps in creating supplemental forms do not have to be performed in the order below.

Step 1 - Create or open the Supplemental form (template) in your word processor

The first step in creating your own supplemental forms is to draft or open a form in your word processor. You can draft your form entirely from scratch; base it on a previously prepared document; or use an assembled ProDoc document.

Step 2 - Identify Items Of Variable Information

Print a copy of the form to determine the variable information on the form. Highlight or draw a line through each item of information that could be considered variable. Variable information is information such as dates, names, addresses, etc. asked for in the same manner each time a document is assembled (e.g. What is today's date?, What is the client's name?, etc.), but answered differently for each client and case (e.g. June 13, 2000, or John Doe).

For example, let's look at a sample letter to a client confirming his appointment. See Figure 1. The variable information needed appears in bold UPPER-CASE letters at the locations in the letter where each answer should be inserted.

Figure 1 - Sample Letter

DATE

CLIENT'S NAME INSIDE
CLIENT'S STREET ADDRESS
CLIENT'S CITY, STATE ZIP CODE

Re: **TYPE OF CASE**

Dear **SALUTATION FOR CLIENT**:

Thank you for contacting our office and giving us the opportunity to review your **TYPE OF CASE** claim.

This letter shall serve to confirm your appointment with attorney **NAME OF ATTORNEY**, on **DATE OF APPOINTMENT** at **TIME OF APPOINTMENT**. If unable to attend this appointment, please contact me immediately at the below listed telephone number.

In order for me to review your claim thoroughly, please bring the following information, if available, with you to your appointment:

INFORMATION TO BRING TO THE APPOINTMENT

If you have any questions regarding this matter, please do not hesitate to contact our office. Your cooperation in this matter is appreciated.

Sincerely,

NAME OF PERSON SIGNING LETTER

Step 3 - Assign tokens to items of variable information

You must assign a token and an appropriate question to each item of variable information in your supplemental form. Usually you will have to create your own tokens ("supplemental tokens"). For some items of variable information in your supplemental form, there might be a Global or Volume token in the database. If so, you may use the Global or Volume token instead of creating a supplemental token.

Supplemental Tokens

For the sample letter above, supplemental tokens and questions might be assigned as follows:

ITEM	TOKEN #	QUESTION
DATE	~P0001S	Date Letter is being written?
CLIENT'S NAME INSIDE	~P0002S	Client's Name for inside address?
CLIENT'S STREET ADDRESS	~P0003S	Client's Street Address?
CLIENT'S CITY	~P0004S	Client's City of Residence?
CLIENT'S STATE	~P0005S	Client's State of Residence?
CLIENT'S ZIP CODE	~P0006S	Client's Zip Code?
TYPE OF CASE	~P0007S	Type of Case?
SALUTATION FOR CLIENT	~P0008S	Salutation for Client?
NAME OF ATTORNEY	~P0009S	Name of Attorney meeting with Client?
DATE OF APPOINTMENT	~P0010S	Date of Client's Appointment?
TIME OF APPOINTMENT	~P0011S	Time of Client's Appointment
INFO TO BRG TO APPOINT	~P0012S	Information to bring to Appointment?
NAME OF PERSON SIGNING	~P0013S	Name of Person Signing Letter?

NOTE: If you have created other supplemental forms for the volume and an item of variable information appears in both the current form and one of the previous forms, you may assign the same supplemental token to the item in the current form as you assigned to it in the previous form. To see a list of all existing supplemental tokens for a specific volume, click **Print > Question Lists > Supplemental Questions**, choose the desired volume and print the report.

Global and Volume Tokens

If a Global or Volume token exists for an item of variable information in your supplemental form then in most cases you can use the Global or Volume token in your supplemental form. Doing so saves you from having to create a supplemental token for the item of variable information. Also, when you assemble documents from both your supplemental form and another form that contains the Global or Volume token in the same assembly session, only the question for the Global or Volume token will be asked. If you used a supplemental token then the questions for both tokens, which would be essentially the same question, would both be asked.

To print or view a list of Global or Volume tokens, select **Print > Question Lists > Global Questions** or **Print > Question Lists > Volume Questions**. For volume tokens you must then select the volume to which you are adding the supplemental form. Volume tokens can be used only for supplemental forms saved in that volume as discussed in Method 1 below. Global tokens can be used in forms in all volumes, including a volume you create as discussed in Method 2 below. You are more likely to use Global tokens, which correspond to frequently used items such as Name of your Law Firm, Law Firm Address and Name of Primary Attorney. In our example we could assign the Global token ~P0190G ("Name of client's primary attorney:") to the NAME OF ATTORNEY item instead of ~P0009S.

Exercise caution when inserting Global and Volume tokens in supplemental forms as some can yield unexpected results. Call Technical Support for assistance if necessary.

Some of the more commonly used Global tokens include:

TOKEN	QUESTION
~P0001G	What is the name of your law firm?
~P0002G	What is the law firm's address (block style)?
~P0003G	What is the law firm's address (line style)?
~P0007G	What is the law firm's phone number?
~P0020G	What is the law firm's county?
~P0108G	What is your first client's full name?
~P0127G	First Client's name and mailing address?
~P0190G	Who is the client's primary attorney?

Step 4 – Create Supplemental Tokens in ProDoc

If you are not using all global or volume tokens in your document, you must create supplemental tokens with corresponding questions. After creating the supplemental questions, enter them in the ProDoc database for use in your supplemental forms. From the toolbar in ProDoc, select **Customize > Supplemental Forms and Questions > Supplemental Questions.**

The **Supplemental Questions** browse window appears. This is where you add, change or delete supplemental tokens and questions. For our example, select **New** to create a new token and question. Next, select the volume and the **Supplemental Questions** dialog box appears.

There are several fields in the **Supplemental Questions** dialog box:

Token - Enter the token for the question, omitting its leading tilde (~) and trailing "S". The token must start with a P. For the first token in our example, we would enter P0001 in the Token field, instead of ~P0001S. Note: you must use capital letters.

Question - Enter the text of the question you want displayed to the user.

Size / Rows - Enter the number of rows (lines) you want to allow for the answer to the question.

Columns - Enter the number of columns you want in each row. The maximum number of columns allowed is 65 columns, which is the width of a normal page.

Step 5 - Insert Tokens into your Supplemental Form

Now, return to the open form in your word processor and replace each item of variable information with the applicable token you created or found for it. After doing so, the sample letter above would look something like the sample supplemental form shown in Figure 2.

Figure 2 - Sample Supplemental Form

~P0001S

~P0002S
~P0003S
~P0004S, **~P0005S** **~P0006S**

RE: **~P0007S**

Dear **~P0008S**:

Thank you for contacting our office and giving us the opportunity to review your **~P0007S** claim.
This letter shall serve to confirm your appointment with attorney **~P0009S**, on **~P0010S**, at **~P0011S**. If unable to attend this appointment, please contact me immediately at the below listed telephone number.
In order to review your claim thoroughly, please bring the following information, if available, with you to your appointment:
~P0012S
If you have any questions regarding this matter, please do not hesitate to contact our office. Your cooperation in this matter is appreciated.

Sincerely,

~P0013S

NOTE: If we chose to use the Global token ~P0190G rather than ~P0009S for the NAME OF ATTORNEY item, then we would replace the item in the form with ~P0190G rather than ~P0009S.

Step 6 – Save the Supplemental Form

Method 1 - Saving to an existing volume

Save your form in the subdirectory of the existing ProDoc volume to which you want to add the supplemental form. For example, a Microsoft Word user creating a letter to confirm a client's appointment to be used in the Texas Litigation volume would save the form letter as C:\prodoc\txlit\ltr1.doc.

NOTES:

1) You can find the subdirectory for any volume by selecting either "Edit volume list" or "Show installed volumes" from the Tools menu and the Registration submenu. "Edit volume list" also shows the complete pathname of the subdirectory if you highlight the volume and click Change.
2) Supplemental form filenames should be no more than eight characters long.
3) The filename you assign must either have no extension or a .doc, .wpd or .wp extension. As illustrated in the above example, Microsoft Word versions 98 and later automatically append a .doc extension to filenames. Likewise, newer versions of WordPerfect add a .wpd extension. Older versions of either word processor may or may not assign an extension.
4) Save the supplemental form as file type WordPerfect 5.x.

Method 2 – Saving to a newly created volume

Another way of saving supplemental forms is to create a volume with a name of your own choosing. In order to create the new volume, open ProDoc and click **Tools > Registration > Edit Volumes List > New.** In the title box type the desired title (e.g. Supplemental Forms). In the Subdirectory box type the name of your new volume (e.g. supforms). You will be asked if you want to create a folder with that name. Click **Yes.** You now have a supplemental forms volume to store your supplemental forms into. Note: Creating a central volume for your supplemental forms enables you to maintain one comprehensive set of supplemental questions instead of smaller repetitive sets of supplemental questions for each volume.

Step 7 - Adding your form in ProDoc's database

Now that your newly created supplemental form has been saved in a volume's subdirectory or a newly created volume, you must add the form to the list of supplemental forms for that volume. Select **Customize > Supplemental Forms & Questions > Supplemental Forms.** This brings up the **Volume Selection** window. Select the correct volume in which to add the supplemental form. Once you have made your volume selection, the **Supplemental Forms** window will appear.

Supplemental Forms Window

The **Supplemental Forms** window contains a list of the supplemental forms currently in a volume. It contains **New, Update** and **Delete** buttons which let you add a supplemental form to the volume, change the filename and title of the highlighted form, and remove the highlighted form from the volume. You can also change the volume shown in this window with the **Change Volume** button. Select **New** to bring up the **Supplemental Form** dialog box.

Supplemental Form Dialog Box

This box contains two fields to fill in.

Filename - Enter the filename for the form. This is the filename component under which you saved the supplemental form when you were in your word processor. For example, if you saved the form as C:\prodoc\txlit\ltr1.doc, then the filename you would enter here would be ltr1.doc.

Title - Enter the title of the form (e.g. confirmation letter) exactly as you want it to appear in the Select Forms window and other windows. It should be descriptive to make it easy to find the desired form in a list.

Step 8 - Test the Form

After creating the form and adding the form and any new supplemental tokens to the database, you should generate a document to test the supplemental form. Start a document assembly session. When you arrive at the **Select Forms** window, select the volume for which you created the supplemental form, then select the **Supplemental** tab. This will display a list of all the supplemental forms in the volume. Select the form that you just created from that list in the same way as you select forms from the main forms list. After assembling a document from your newly created supplemental form, examine it to insure that the answers to the questions appear as expected.

Appendix E - Backup and Restore

BACKING UP FILES

Most people inadvertently delete files at one time or another. Hard disk drives can fail after extended use. To protect against such loss of data, you should make regularly scheduled backup copies of important data files to one of these forms of backup destinations:

- Removable media (diskette, writable CD, ZIP disk, data tapes, or a flash drive/thumb drive)
- Network drive on your office network (preferably to a server using a RAID disk storage subsystem)
- Off site data storage facility/data center

The ProDoc backup utility, at **Customize → Options → Backup** automatically creates a backup of all of your client data and case data, including case answers and links to existing documents.

If you run the SOS program and do your systematic backups from that program, all SOS billing and case management data is backed up, as well as the ProDoc program data listed above.

Due to the flexibility built into ProDoc, many other files containing modifications you may have made to your ProDoc data files may exist. These modifications include document formatting changes; modified master forms; and supplemental volumes, forms, and questions.

The automatic back up features in the ProDoc and SOS programs *do not* back up these additional personalized files or your completed documents. For this reason, we strongly encourage you to perform additional systematic backups of your completed documents and any other modified or customized forms and documents you have created, in addition to using the automatic backup utility.

File Structure Planning

If you save the backup files in the same file structure used by ProDoc, it's *much* easier to restore correctly.

Perform these steps to set up the file structure on your backup drive:

1. Create a folder on your backup drive and name it **ProDoc Backup Utility Files** (For example: **Z:\ProDoc Backup Utility Files\ProDoc**, where **Z** represents the backup drive letter).
    a. Locate and copy the entire ProDoc installation folder (by default, **c:\ProDoc**) to this folder. This will work well as long as you have enough available space on your backup drive.
    b. Locate and copy the **clients** folder (by default, **c:\Clients**) to this **ProDoc Backup Utility Files** folder.
2. If you want to reduce the amount of drive space used on the backup drive, and make the restore process quicker, you can remove certain files from the folders you copied to **ProDoc Backup Utility Files** folder:
    a. In the copied backup folders named **ProDoc** and **Clients**, highlight and delete all individual files in the folders.
    b. Open each individual subfolder, and delete all individual files in each one. Don’t delete the

folders themselves.

c. You should only have empty file folders when you are finished. This file structure will help save drive space and make the restore process quicker.

Backup Procedure

If you set up a file structure as described above, the steps in this section will help you ensure that any new ProDoc installation will operate in the same manner as your old installation. **Note:** SOS users should set up backups through SOS instead of ProDoc to preserve billing and case management data along with client/case data.

Perform these steps to back up your ProDoc data files:

1. Click **Customize → Options → Backup** to configure the needed settings.
   a. Check the **Auto Backup at exit** box and set the **Days between backups** number (we recommend using **0** to always backup when you exit ProDoc).
   b. Click the **Station triggering automatic backups** field and select the login name or initials of a user who uses ProDoc on a daily basis.
   c. In the **Backup folder** field, enter the drive letter and folder names you used in step 1 under File Structure Planning, (For example: **Z:\ProDoc Backup Utility Files\ProDoc**, where **Z** represents the backup drive letter). Click **OK** to save your changes.
2. Back up your **completed document folders** to your backup drive every day, or any time you create/update documents. If you use the default document locations, copy the **c:\Clients** folder to your backup drive. If you save documents elsewhere, back up the appropriate folders, preferably to the same location or folder on the drive relative to your ProDoc installation folder.

If you are sure you **haven't** modified ProDoc, you can stop here. If you **have** modified document formatting or forms; or created supplemental forms, questions, or forms sets; continue to Step 3. You need to back up these files.

3. Perform the following steps once, then do them again any time a user changes formatting, modifies a form, updates supplemental forms/questions or creates/modifies a form set.
   a. In the installation directory (by default, **c:\ProDoc**), copy any files named **xxxgcfg.ini** (**xxx** represents user login name or initials) to **Z:\ProDoc Backup Utility Files\ProDoc** where **Z** represents the backup drive letter. Do the same with the **global.cif** file if it exists.
   b. In each subfolder of the installation directory, locate the following files and copy them to the same folder name on your backup drive:
      i. Any files with the extensions **.doc, .wpd, .wp, .cif,** or **.ini.**
      ii. **Docgrps.tps, grpitems.tps, Sdocs.tps, SQues.tps, SLogic.tps** and **SAuto.tps**.

To make the ProDoc installation work correctly, these files must all be copied to the **same folder location** on the backup drive relative to their folder location in their original drive.

Follow the steps in the following section, **Restoring from a Backup** whenever it becomes necessary to restore files from the backup you have made.

RESTORING FROM A BACKUP

Like backing up files, restoring is a matter of specifying what, when, where, and how. You probably chose to restore data files because your hard disk was replaced or reformatted, or perhaps you have reinstalled the ProDoc document assembly program (and perhaps the SOS program as well). Here is what you can expect out of your new installation depending on what was previously backed up, from the least effective to the most effective backup routines:

1. If you have **only** used the backup utility from ProDoc or SOS, your client, case and document listing will be restored and your case answers will also be restored. You will need to reassemble your documents, and any modifications or additions to forms will *not* be made to the documents unless you re-enter the modifications before reassembling. Any changes to documents made through your word processor and saved will not be included.
2. If you also backed up your completed documents, these will be available as before.
3. If you used the backup utility from ProDoc or SOS, and also backed up your completed documents and any modified files, your new installation will basically operate exactly as it did before.

If you used a commercial backup program to do your backups, you should follow the program's instructions as well as those below. The steps in the following procedure assume you use the Windows Explorer program to locate and copy the backed up files.

Restoring Backed up Data Files.

This procedure assumes that the ProDoc program (and the SOS program, if subscribed to) was successfully installed from a CD. If you encountered problems during this installation process, call Customer Support at **1-800-759-5418** for help.

Perform the following steps to restore your backed up data files.

1. Restore files backed up with the ProDoc or SOS backup utility.
   a. If you **don't** use SOS: In ProDoc, Click **Tools → Backup Data Files → Restore.**
      i. If you are using a network installation, ensure no other users are logged in and click **Yes** on the warning window. If ProDoc is not networked, click **Yes** on the warning window.
      ii. Click **Restore** on the next warning window.
      iii. Enter the location of the backup files in the **Files to Restore Location** window. Click **OK.** Your client, case and document list will be restored.
   b. ProDoc *and* SOS users: Perform these steps in SOS if you performed backups through SOS:
      i. Click **Utilities → Back up data files → Restore data files.**
      ii. Enter the backup file location on the **Files to restore location** window. Click **OK.** Your data files will be restored for both ProDoc and SOS.
2. If you backed up your **completed documents,** locate the backup folder location.
   a. Users who used default document locations can then copy either the **c:\Clients** folder to the ProDoc installation directory, **c:\ProDoc** if installed to the default location on a stand-alone computer, or copy all backup folders named after clients to the **Clients** folder in the ProDoc installation folder. If you see a warning about overwriting existing files, confirm that these should be overwritten. Your backed up documents will then be restored.
   b. Users who did not use default document locations should copy the backup document folder(s) to the same location on the drive in which these were placed before. Your backed up documents will then be restored and can be accessed through the **Clients & Cases Document Manager** if they are restored to the same location.
3. Users who modified document formatting or master forms, or created supplemental forms and questions should locate and restore these files. If nothing was changed or not backed up, you can skip this step.
   a. If you used the steps under **Backup Procedure** in the **Backing Up Files** section, you backed up the following files:
      i. In the ProDoc installation directory (by default, **c:\ProDoc**): Any existing **xxxgcfg.ini** files (**xxx** is each user's login initials/name) and **Global.cif.**

ii. In each volume folder: Any files with the extensions **.doc, .wpd, .wp, .cif** or **.ini** and any files named **Docgrps.tps, grpitems.tps, Sdocs.tps, SLogic.tps** and **SAuto.tps.**

b. Copy these files **and** all volume folders to the ProDoc installation directory and overwrite existing files.

c. If you have created and backed up any supplemental volumes, you must place these back on the volume listing. Click **Tools → Registration → Edit Volume List** and add the information required for the supplemental volume(s).

4. If you didn't do so before, set up a backup routine as described in the topic **Backing Up Files**

Your latest ProDoc installation should now run as it did before. If you encounter problems during this process, call Customer Support at **1-800-759-5418** for help.

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